

SUCCESSFUL

**Sales and
Marketing
Letters**

394 READY-TO-USE LETTERS

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PART 1

**THE
SALES
CYCLE**

106 READY-TO-USE LETTERS

Follow-Up to Phone Call or Appointment: Guidelines and Alternate Phrases

- ▶ **Thank the reader for taking time or making the effort to talk with you on the phone or in a personal interview.**

Thank you for a most enjoyable chat last week about your upcoming software decisions.

I appreciate your courtesy in spending so much time with me discussing your future plans. After our meeting, I feel as though I can really get a handle on your needs and research the exact kind of equipment your setup calls for.

I was happy to have the opportunity to talk with you on Monday. From your comments about the incompatibility problems, I thought you might like some additional information on the WWT. Therefore, I've gone back through my files to get the announcement memos for the WWT so that you can get a better perspective on that product.

I enjoyed our brief visit last week and want to thank you for taking the time to meet the newest member of our sales team.

Thank you for taking the time to see our demonstration of the laser printer last week. We were very much impressed with your organization, and we also hope you were equally impressed with our printer and support service arrangements.

Thank you for allowing me to introduce myself on the phone the other day. As I mentioned to you,....

It was good to see you the other day, and I appreciate the time you took out of your busy schedule to hear our story.

Thank you for talking with me this morning and giving me an update on your activities. We value your business and look forward to continuing our strong relationship.

I want to thank you for the opportunity to meet you last week and discuss with you the options for new telex equipment. As we discussed, I am now prepared to back up some of my claims about...

I appreciated the opportunity finally to be able to meet with you yesterday after our many visits on the phone. Customer feedback is important to me; I thought our discussion was informative and useful and hope you felt likewise.

Please accept my sincere thanks for the candid interview we recently had. With your comments, I feel we have a better perspective on your needs.

Thank you for your time yesterday.

- ▶ **Reemphasize the key benefits of your product/service to the customer.**
- ▶ **Suggest the next action step: Your plans to phone again for a decision. Submission of a proposal or quotation. A phone call from the reader. A free demonstration or an “on-approval” arrangement.**

Please give some thought to how we might schedule this work. I'll check back with you in a few weeks.

Let us know when you're ready to move forward on this.

I'll look forward to the call from your CFO that you promised.

Whenever you're ready for the demonstration, give me a call. I've noted that you prefer Tuesdays, Wednesdays, or Thursdays, and I'll do my best to accommodate your preference.

I suggest that you circulate some of the information I left with you. If there's interest from your staff, let me know.

Should you have absolutely no interest in the fabric, I'll appreciate your phoning to let me know. Otherwise, I'll be investigating the pricing arrangements we discussed.

We look forward to submitting our recommendations to you in the very near future.

As you suggested, I plan to call Barney Malone in your accounting department to see if we can talk further. I'll let you know if we run into further issues that need clarifying.

I'll be in touch with you in the next few weeks as you evaluate your alternatives.

Please let me know what other information you need to make your decision. I'll phone again Friday.

I encourage you to complete the questionnaire I left with you so that we can schedule adequate time to help your staffers as they move forward.

Would you please let us know when you're ready to see a proposal?

If you do decide not to attend the conference, I'll phone you again next month to give you a personal demonstration.

Please add us to your list of bidders. We're eager to get your business.

I'm making a calendar note to call you again in the fall to see if you might be free to attend another seminar like the one you just missed.

Would you give me a call after you've had time to investigate your needs further?

As soon as I receive more information on these prices and procedures, I'll let you know.

We look forward to the additional relationships with your firm. Bill Jordan and Susan Green will be talking with you further.

Follow-up to Phone Call (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Emily:

Since our January 4 phone conversation, I've put together some pricing information for our document bindery product line. Specifically, our Easy-bind model could provide an excellent solution at a lower cost than you expected. Additionally, this model means that you can now saddle stitch larger documents without having to outsource the job. Upon further discussion of your particular situation at ADX, Inc., we can determine which model makes the most sense for your uses.

I welcome the opportunity to demonstrate the Easy-bind to you or any of your staff. I am confident that you'll think our products provide the best solution—and value—for your document bindery needs.

I'll talk with you again in a few days.

Regards,

Follow-up to Phone Call (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mrs. Grace:

It was certainly a pleasure talking with you today, and I would like to thank you for giving Brooks International the opportunity to be of service.

As I promised, I'm enclosing a copy of *The Savvy Investor*, which will give you a brief history of our firm. Particularly, note Chapter 7 for the investment strategies we were discussing today. Let me reemphasize that the research techniques we use are unmatched anywhere—in a matter of hours, we can have a report to our customers on all major stock purchases or sales by corporate officers of a particular company.

We're looking forward to providing this investment research to you. I'll phone again next week to see if you've come to a decision.

Sincerely,

Follow-up to Phone Call (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Peach:

Thank you for talking with us last month when we conducted our telephone survey in the Brighton area. You expressed some interest in our custom packaging processes.

Therefore, I'm enclosing a data sheet and photos of recent designs for other clients. Note the quality of the reinforced spines on the boxes and the way the logos have been imprinted so as to give you maximum use of the front covers.

I'll be back in touch in a few weeks to see which kind of packaging best suits your needs at Brighton. In the meantime, however, if you have an immediate need or question, call me at 467-3444.

Regards,

Follow-up to Phone Call (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Jacklee:

Would you please reconsider talking to me further about your color monitor needs. Because you requested that no salesperson phone you, I am asking you to call me so that I may provide you, at absolutely no charge, my services as a network administration consultant.

My experience has been to advise customers and prospects on hardware products compatible with those they've already purchased. Most businesses like yours start with only a system or two and grow from there. And that's where I come in—to protect that initial investment.

If you choose to use my background and experience to help you find a cost-justified solution for Danderson Consultants, please give me a call at 555-2222. Just talk and results—no strings attached.

Sincerely,

Follow-up to Phone Call (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mrs. Brand:

Thank you for the opportunity to visit with you by phone today and discuss your specific needs at Mackie, Inc. As we discussed, I am eager to work with you in providing janitorial services and can offer:

- Deep cleaning on a quarterly basis
- Inside and outside window cleaning
- Computer equipment cleaning
- Bonded cleaning professionals

I'm enclosing a brochure that details these services; perhaps you can share it with other managers in your organization as a networking tool.

Thank you again for taking the time to consider our janitorial services. I look forward to hearing from you again when you reach a decision. Should I expect a call by the end of the month?

Cordially,

Follow-up to Phone Call (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Bart:

I was happy to talk with you briefly this morning on the phone regarding our continuing interest in having you visit our corporate offices in Austin.

In view of the recent developments with robotics at your plant, I certainly appreciate the increased activities and the scheduling of your valuable time. If I can assist in coordinating such a visit for you, or any of your associates, please call me at your convenience at 512-555-1111.

Enclosed is our annual report; it emphasizes how our recent growth reflects our commitment to customer needs such as yours. Particularly, pages 5 through 7 may be of interest to you.

I'm eager to hear from you about scheduling the visit.

Cordially,

Follow-up to Appointment (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Jenkins:

Thank you for your interest in discussing disability assistance products on Tuesday morning with me.

I hope I left you with a favorable impression of our portable wheelchair ramps and water fountain access equipment products. After your comments about providing convenient methods for navigating through your building for your new employee, I investigated further how the equipment can help you:

- By installing either the portable or permanent ramps for your entrances, you will be helping your new employee, and also opening the door for future opportunities for future physically challenged employment candidates.
- With the latest regulations for equal opportunity in your county, it seems inevitable that you will need to upgrade your facility at some point anyway.
- Although we have yet to announce this policy to the public formally, we will be increasing our prices by 18 percent in the third quarter. By acting now, you will save your company a great deal of money.

As I mentioned, our parent company, Medisales, has long been committed to this industry. Our continuing interest in serving this clientele is extended by our expanding line of other innovative products, such as our unique wheelchair ramps and elevators.

If you have any questions about Medisales products, either of a commercial or a technical nature, please phone me again at 555-5555, and I'll do my homework for you.

Sincerely,

Follow-up to Appointment (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Jackie:

As we discussed last Wednesday, I'm enclosing a copy of a data sheet on disk duplicators for your in-house newsletter distribution. This same disk duplicator can often reduce test time and improve the quality of disk error interpretation. In fact, many of our customers have been able to reduce their test time by up to 45 percent.

I'll plan to call you again the week of June 2, after you've had time to review how our product may be able to improve your duplication capabilities.

Let me recap some of the issues we discussed that will have direct impact on your immediate decision:

Speed: The Megadisk will allow you to duplicate 45 disks per minute vs. your current equipment that duplicates at a rate of 10 disks per minute.

Failure Rate: The Megadisk has a failure rate of .001 percent vs. the 2 percent that you are experiencing with your current equipment.

Technical Support: The Megadisk comes with one year of free technical support.

I appreciate your interest in our disk duplicator, Jackie. I look forward to discussing your needs and our equipment again in a few weeks.

Sincerely,

Follow-up to Appointment (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Raymond:

Thank you for taking time to meet with me yesterday. As your new SafetyCo representative, I am anxious to learn more about Widgets 'n Gadgets, Inc. and your often-spoken-of operations. The tour of your plant gave me an inside view of how your products are manufactured and some of the areas that you are interested in improving.

I want to compliment you on the business plan you've already developed. The initial task of identifying such needs is always difficult, but we hope to provide resources to help you along the way.

I am looking forward to our next meeting with you and Rachel Rite on May 12, when you will be at liberty to discuss further your budget and plans to install the necessary safety equipment at your plant.

Sincerely,

Follow-up to Appointment (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Madeline:

After yesterday's meeting, Colleen and I were very encouraged by your comments and enthusiasm. The discussion helped us to better understand the issues and concerns of your telemarketing setting.

I hope the meeting was equally enlightening for you. Our goal was to provide you with additional information on how we can help in these ways:

- On-site customer service training to both new and seasoned telephone staff
- Staff survey of areas for improvement
- Motivational tools to achieve consistent quality of service

I think Colleen's position—a dedicated specialist—exemplifies our commitment to your organization.

I look forward to learning more about your organization by working closely with you in the future to establish a long term relationship. Again, thank you for your time.

Sincerely,

Follow-up to Appointment (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ralph:

Paul Sinclair and I want to express our appreciation for your making time available to visit with us last Monday afternoon. Your comments and insights made it a very interesting and worthwhile conversation. Particularly, your comments about high-rise structures gave me a new perspective on earthquake damage prevention.

With the new year in full swing, I look forward to strengthening our partnership in the future. I encourage you to call with any questions or concerns; in the meantime, I plan to give much thought to how we can help you improve your blueprint archival operations.

Sincerely,

Follow-up to Appointment (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Emilio:

I am pleased with the outcome of our meeting on Friday, and I hope you are likewise. Two pivotal factors that always determine how meaningful such meetings can be are: Did the right people attend? Were they active in expressing their views? On both accounts, we think the meeting was a complete success.

As you review the enclosed notes of our meeting, see if you agree that they reflect sound information opportunities to address current problems and enhance your ability to better accomplish the mission.

The approaches you currently use provide an excellent base from which you can work. The degree to which you succeed will be largely determined by the level of commitment we saw from your staff.

I commend you for taking the first step. Thank you for allowing us to participate.

Sincerely,

Follow-up to Appointment (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Geneva:

I want to thank you for attending our project management software demonstration last Wednesday. With your suggestions and insights, the event proved to be a great success.

Both Jerry and Bill were very encouraged by the enthusiasm and questions relative to your situation. I'm confident that Rachel, together with Kirk, can provide you with a comprehensive and effective plan for furnishing your offices nationwide with quality project management software at a competitive price.

When you're ready to make the exact selections, call me at 555-1111. I'm eager to get those packages on their way to your offices.

Sincerely,

Follow-up to Appointment (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Joanna:

I think we spent productive time together—time that should provide an outline for longer, more detailed planning on how our teams can best work together.

As you requested, Janet will provide for you, in the next few days, a list of our area sales team as well as a contact list for your strategic staff.

Below is a list of other information that I'll be providing in the next few weeks:

- Contact information on your product support representatives
- Upgrade paths for your existing products
- Training dates for your help desk staff

In reflecting on our conversation, I did not discuss one important issue. Let me mention that because you are currently planning on purchasing 250 units, your company will qualify for an additional training session free of charge during the next year. You may want to consider waiting to take advantage of this opportunity later in the third quarter so that your staff will have had some time to explore the product and gain a higher-than-beginner level of training.

Just in case we do not “connect” in the next few weeks, I wish you and your whole team a very happy holiday season. I'm looking forward to our next meeting.

Best regards,

Follow-up to Appointment (Example 9)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Donald:

Thank you for your willingness to discuss your concerns, suggestions, and questions as they relate to intra-airport transportation.

Your input will be an important ingredient in the mix of information required to design a subway system suitable for the Denver Airport. It is a formula that we hope will solve problems, create a transportation system tailored to the traveler's needs, and result in a mutually beneficial relationship between our two organizations.

I'll be in touch again shortly after your return from vacation. Have fun!

Regards,

Follow-up to Appointment (Example 10)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Michael:

I look forward to working with you over the next few months as you evaluate your alternatives for legal document retrieval.

As we discussed in our Wednesday meeting, I am compiling a list of references who are in businesses similar to Law-for-You. In addition, I will survey our file cabinet suppliers to see if I can locate the equipment you need for your new location.

Also, please take a few minutes to look over the enclosed articles that may be appropriate to your eventual decision. Particularly you'll note the opinions about changes in regulations relating to the appropriate duration that legal documents should be made available presented in the *Business Lawyers* article.

I will be back in touch with you next week. Again, thanks for your time.

Cordially,

Follow-up to Appointment (Example 11)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Beverly:

Thank you for rearranging your schedule to see me on Wednesday. I appreciated your briefing me on your long-range plans for Seismico and your desire to outsource a portion of your internal software development. We view your needs as those of a company positioning itself to launch into the next generation, and we believe we can help you.

Essentially, if I understand you clearly, your needs for the next year will be:

- to complete your current employment identification system in-house
- to turn-over your security system code to our development staff for completion by July 17
- to begin efforts on your contract automation project with us by May 1

We can meet those needs now! If this isn't reason enough to make a decision to contract our team immediately let me offer you two more:

- We will work on your employment identification system upgrade at an apprentice rate to fix any bugs in your system.
- We guarantee that our programs will be completed error free within 2 weeks of your deadline, or we will continue to perform at no charge until you are satisfied.

We want to position Technical Services, Inc. in your mind as a company that adds significant value to the marketplace. We want you to think of us as the company that can solve your outsourcing problems and fill your development needs this year and in the coming decade.

The week of April 15, I'll plan to give you another call to discuss the next step.

Sincerely,

Follow-up to Appointment (Example 12)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Derrick:

Thank you for discussing your upcoming construction project with us. Some of the contractors you select to bid on the work will be familiar with our backhoes from their involvement on similar projects. Although many contractors are familiar with the value and performance of our backhoes, they very often compare the cost of purchasing a backhoe directly with renting. This overlooks the long-term cost associated with having their own equipment available to their crew at any time. As you are aware, the true cost comparison should be between the total installation and long-term operation of these machines.

I hope we answered any questions you had about the features and benefits of our backhoes. Our Z-543 continues to grow in popularity as we introduce it in new markets. Its unique design centers around its innovative arm and spade, which eliminate the need for larger machines.

Of course, the most important, yet most easily overlooked, advantage of our products is their durability under the wide range of conditions experienced in the field. You can be confident of their effectiveness and reliability.

Since you mentioned that three major companies have been approved to date as suppliers of construction products, we would like you also to consider the use of our backhoe for this project. We will be demonstrating the Z-543 at the show in Seattle and hope we can discuss the merits of the product at that time.

Please let us know if you'll be able to attend so that we can forward a free exhibit pass.

Sincerely,

Follow-up to Appointment (Example 13)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Jim:

Thank you for taking the time to meet with Randy Thompson and me yesterday. We were both very impressed with your organization and what you've accomplished personally and collectively.

I've addressed some of the outstanding issues that we discussed:

- Our crew will deliver and install all the equipment the week of June 22.
- You will have the required plumbing and electrical changes completed by June 17.
- Our service technician will be in your plant on a full-time basis from June 17 until the end of July to assure that the changeover is accomplished without incident.

You also asked about our product guarantees. I'd like to re-emphasize that we stand behind our equipment without exception. In other words, our guarantees are good for as long as you own the product.

A contract will be forwarded to you as soon as it has been completed.

I'll be back in touch with further information about these issues within the week.

Cordially,

Follow-up to Appointment (Example 14)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Jennings:

As I promised on Tuesday, I'm enclosing for your information a sample specification sheet and pictures showing results of water filter quality testing.

Each water filter is custom-designed to fit the various criteria of our clients.

We believe Industrial Filter 3 offers many advantages for water purity in your photographic processing plant.

At the present time, Rodak, Huji, and Repros are using our Industrial Filter 3 at their respective locations. All are very pleased with the results and are willing to share their experience with you.

After you have finished with the photos, please return them to my attention. We'll talk again after I return from Chicago.

Sincerely,

Follow-up to Appointment (Example 15)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ray:

I had hoped to have the opportunity to meet you last week while I was in New York City. Unfortunately, you were unavailable; therefore, I left some technical data on our bindery products with your receptionist.

With the recent introduction of our perfect binding product, we can now offer a faster, more reliable method for report and proposal presentation. Additionally, this product is engineered with the highest grade components to ensure long-lasting durability.

In order to help you evaluate our products, we welcome the opportunity to demonstrate them in the field or to provide samples for your own in-house testing. With our expanding line of innovative products, we are confident that we can provide solutions to many of your document presentation efforts.

In any case, I trust the literature on our company products will be useful to you as a reference source. We look forward to hearing from you.

Sincerely,

Follow-up to Appointment (Example 16)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Thompson:

I enjoyed our Wednesday visit and the chance to review some of the details of your upcoming water table study with Environmental Research.

We certainly were pleased to learn of your recent decision to evaluate the impact of the development on sector 3. As you recommended, we intend to follow up with Marge in seeing that you get the full benefit of our services in your current operations.

We are quite confident of our ability to respond to the exacting technical and commercial demands of a project of this scope. The response by our manufacturing group has been so timely that we are currently well ahead of the required shipping schedules.

We look forward to the opportunity of working with you and look forward to receiving your request for proposal.

Very truly yours,

Follow-up to Appointment (Example 17)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Marilyn:

Thank you for visiting our showroom last week and allowing me to spend some time demonstrating our newest luxury car, the Rexar.

We sincerely want to earn your business. When you return, please bring this letter with you for additional accessory consideration and ask for me by name. That way, we don't have to "begin at the beginning" and waste your valuable time.

Again, thank you for giving me the opportunity to assist you with your upcoming buying decision. We think that, with further investigation, you'll soon agree that Rexar is exactly the answer to your transportation and comfort needs.

Best regards,

Follow-up to Appointment (Example 18)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Cook:

After your meeting with Bill Shore last week, he passed on your name to me because of your interest in the upcoming INDEX Expo. Thank you for taking the time to consider this important event in your marketing efforts.

As you're probably aware, a show's measure of success frequently focuses on quantity of attendees rather than on quality. Ours will be different. The series of events that we have planned will emphasize an environment conducive to actually making the sale on the spot. In the enclosed literature, you'll note the larger booth spaces and the opportunity to schedule additional space in our "Product Aisle" to let your prospective customers get their hands on your products.

A second key difference in this show will be the very focused way we've gone about selecting our mailing list for pre-show publicity. All in all, we estimate that 70 percent of our buyers will be customers who "have checkbooks in hand."

Your time is valuable, as is ours. If you're interested in participating in the show, simply return the enclosed card, indicating which events will be of most interest to you. When I receive your card, I'll be in touch again with the specific contract forms or other information you need.

Cordially,

Follow-up to Appointment (Example 19)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Julie:

As we discussed, I have attached a summary of a staff study that could serve as a starting point for your upscale toys market analysis. My work-up is skeletal and simplistic, but we believe a study of this kind could provide you with key answers to your target market questions.

Generally, the study should measure the present value of benefits such as quality and durability of the toys and the consumer's desire to provide a status oriented toy for his or her child.

Let me know of other interests as you talk to your other key managers. Shall we talk again sometime in April?

Sincerely,

Follow-up to Appointment (Example 20)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Richard:

Enclosed is an analysis of accounting costs for services performed in Silver Spring under contracts #X125, #R165, #HO5555, and #PR2.

Because 100 percent of area costs have been settled by previous cash calls, this information will give your accounting group the supporting data necessary for future joint billings. We will adjust our January 15 cash call to account for the difference of \$___ in December and the actual cost of \$___ in the attached analysis.

I certainly enjoyed visiting with you and Amy Quigley at our meeting last Thursday. Let me know how I can help in other ways. You can always reach me at 555-5555.

Sincerely,

Follow-up to Appointment (Example 21)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Andrew:

Thank you for taking the time to meet with me on Friday so that I could further explain our executive placement services. I think that our meeting was mutually beneficial.

Let me highlight what I believe are the most important issues for both of us:

- Deadlines for placing executives into your new inventory management program
- Compensation packages that will be made available to the chosen candidates
- Relocation reimbursement/packages for transplant executives
- Qualifications required for viable candidates

Again, we appreciate your valuable time and your willingness to be so candid about your concerns. May we talk again in the next few months? If I don't hear from you in the meantime, I'll be in touch again toward the end of the year.

Sincerely,

Follow-up to Appointment (Example 22)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Jessica:

We recommend the installation of our mainframe system to replace the two machines currently installed. Consolidating your workload at your existing site will save an estimated \$___ in your expenses budgeted for 20—. Furthermore, this system will provide even greater reliability than your present system in that this latest model has been tested for the last 12 months at 300 Fortune 500 companies and has failed only twice.

Reasons beyond the additional dollar savings include:

- Less down-time for maintenance
- Fewer technicians necessary to field trouble-shooting and operational questions
- New in-system cooling mechanism

Attached you'll find documentation detailing the points above.

We look forward to working with you on this replacement. May we start the paperwork?

Sincerely,

Follow-up to Appointment (Example 23)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Consuela:

I enjoyed learning about HTL Dynamics, specifically your latest achievements in the areas of semi-conductor technology.

To answer your major question, you qualify for up to 30 percent off list prices for cellular phone installation and air time. With that discount, we hope you'll be able to make an immediate decision on this fleet of car phones.

Enclosed is a complete price list, as well as information about each of the maintenance programs.

Some of the other new services we now offer include:

- Prime-time discounts for local and long distance calls
- Rebates for an excess of 45 hours of air time per month
- Vandalism alarms that alert our auto-call beeper system

Again, it was a pleasure meeting you; I'll phone you next week to see if you're ready to start the paperwork process.

Sincerely,

Follow-up to Appointment (Example 24)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Jose:

Thanks for taking time to meet with Kirby Haltom and me on Tuesday to discuss your concerns about our meeting your direct-mail printing deadline. I think we now have a much better understanding of some of the issues you are facing in the next several months. My intention is to improve the existing relationship through better communications and customer service.

During our meeting you requested information on our Docuquick service. I have attached the appropriate literature to describe each model and its unique feature. After reviewing this material, please call me if you have questions about “translating” these features to your specific site.

I have also asked Ilene Buster, our customer service representative, to give you a call to discuss the upcoming deadlines.

Again, thank you for your time. We at Qualiprint look forward to working with your organization. Both Kirby and I will follow up with you within the next month.

Sincerely,

Introduction of Your Firm to the Community: Guidelines and Alternate Phrases

▶ **Introduce your company.**

You have a new neighbor: Proven Products.

Major Appliances is expanding to Brownwood—you will find us at 2500 West Lamar.

We've had so many mail orders from Westwood that we are opening a new Country Garden store at the southwest corner of Fifth and Main Streets.

▶ **Include a description of your products or services. Distinguish your company from similar firms in the area. Explain the benefits of your products or services to your customers.**

Specifically, our goal is to add value to our current products by giving you new innovative services to accompany them—training and consulting departments.

We have an extensive inventory of parts and supplies for all your computer needs. We will provide the part or service you need when you need it—we guarantee it. If we have to order a part for your system, you will receive a 20 percent discount.

Our business was formed to assist your business. We can provide competent professionals to fill positions in your organization. Our nationwide base of executive talent has assisted many firms like your during times of rapid growth. You can concentrate on your products and customers while we concentrate on your staff needs.

▶ **Include a date when you will be ready for business if the announcement precedes your opening.**

Construction is well underway and we are planning a grand opening on September 16.

Please make a note on your calendar to visit us on June 22 for demonstrations of all our products.

We look forward to serving your needs in 20— and will open for business on January 2.

▶ **An introduction is an excellent opportunity to sell. Include a business card, phone number, catalogue, or order form to make it easy for your reader to obtain more information or to place an order. You may wish to include a brochure or even a sample of your product.**

Just call 444-7880 and give us the opportunity to show you just how exceptional our service is!

Enclosed is a brochure of our current weekly specials. Perhaps you will find something that you need and have been unable to locate elsewhere. We pride ourselves on our extensive list of exclusive items.

We have enclosed a copy of our latest catalog. You will find all these items—and many more—when you visit our new store.

Introduction of Your Firm to the Community (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Mann:

Chameleon Consulting provides full-service contract database development services to busy corporate departments. Major organizations like Ibsen Electronics, CG&V, Inc., and Augur Aeronautics have turned to us for their needs.

What makes us different from other firms is that we actually use developers with backgrounds in our clients' industries rather than simply hiring anyone with programming experience. The hard-to-complete jobs such as creating multimillion-record databases custom-made for heavy industry are our specialty. Our process involves three phases for completion:

- Design, including a detailed schedule of development
- Development, with regular reports on progress and modifications to original design
- Testing, with the actual end-users of the product

We know how to work all phases of the development process because every member of our firm has a strong history as both programmer and project manager.

Our efficient methods can actually reduce your in-house cost to converting existing databases to entirely new systems. We can even train your own staff members to be your in-house technical support.

We charge a flat hourly rate rather than a percentage and our staff is available to work anywhere to fit your particular needs—on your schedule.

We would be delighted to have you speak with our clients. Call us at 1-800-555-DATA for further information.

Sincerely,

Introduction of Your Firm to the Community (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Abernathy:

California is not lacking in repro-graphic service firms. Yet, there is a vast difference among them. Your needs probably go beyond the grasp of the annually advertised “copy people.” And the so-called prestigious firms, which cater primarily to large corporate clients, may reserve only limited time in their busy schedules for the individual or small-business person.

I am pleased to announce that there is now an alternative. Our professional service bureau, located conveniently in the Haight-Ashbury area, offers some important advantages:

- Personal attention by our principals
- Individual and corporate plans
- Twelve years’ experience in the repro-graphic industry
- Competitive hourly rates at \$____

Our firm knows that the requirements of many clients exceed the basic needs of routine photostats and color copying. We can help you with printing services that not only include fast turnaround, but also high quality output. We are alert to today’s ever-changing legislative and economic environment.

For more information on our services, please give us a call at 1-800-555-2342. We look forward to delivering unique, innovative, and progressive services to Rivera Design. Excellence is our goal.

Sincerely,

Introduction of Your Firm to the Community (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Dorman:

Would you like to sit at your desk without feeling like fidgeting every three minutes? Then let me take this opportunity to introduce myself and Ergo-Chair, the quality developer and manufacturer of ergonomically designed office furniture. We are the first company to create a series of workstations designed specifically to eliminate back pain, fatigue, and carpal tunnel syndrome.

What's more—we're in the neighborhood, conveniently located at 122 Burnett Avenue. Please take a few minutes the next time you're passing our offices to stop by our showroom so that we can give you a personal demonstration. If you'd like to ensure that you do not have to wait to talk with us when you stop by, simply call us at 512-555-5555 so that we can schedule a specific appointment.

I have taken the liberty of enclosing our product guide that describes the features and benefits of the first executive chair in our series. We look forward to discussing our products in greater detail with you.

Sincerely,

Introduction of a New Product or Service: Guidelines and Alternate Phrases

- ▶ **Arouse interest immediately—with a provocative question, a startling statistic, a pithy quote, a problem statement, a dream, or a promise.**

If you're like most marketing professionals, you're probably finding it increasingly more difficult and expensive to reach qualified prospects.

You should be able to cut your check-processing time in half with a new ____.

We've already proven we can help you eliminate malfunctioning ____ in your large offices—and we think we can now do the same thing for your home. We now have....

Do you know where you plan to be in your organization in five years? Do you want to know? We want to help you answer that question. We're looking for qualified representatives in your area to....

Have you noticed that budgets and goals often contradict each other? We understand. And we think we have a promising solution.

You can now purchase ____ directly from us. No more waiting and paperwork delays.

Thank you for asking about our new consulting services. We're pleased to say that we can now provide....

We've just completed a landmark study—the results of which should have an impact on the way your organization....

If you've ever tried to learn a software package without benefit of an excellent learner's guide, you'll appreciate knowing that....

By now, you've read numerous news stories and journal articles about ongoing problems with.... We can help.

Why should you go through the usual hassle of changing insurance carriers? Two reasons: one is....

Are you prepared to answer some tough questions? What are you planning to do next year about...? And about...?

When you responded to our recent telephone survey about..., you confirmed the need for more.... As a result of your comments about how we can improve and expand our services, you may be interested to know that....

As the owner of a small business, you know how much effort it takes to succeed. We congratulate you. And we'd also like to help you. I think you'll be interested to know about....

We want to introduce you to a product that in its first six months on the market has captured attention in the most respected industry journals such as _____. Here's why....

Did you see the recent article in _____ about a new method of...? If not, I've enclosed a copy of that article and noted in the margin something that should mean direct dollars to you.

Cost-of-living increases are a benefit that most of your employees expect. Relocation assistance and medical benefits are also key issues with them. But how much is too much? How much is fair?

If you own a home, please take a minute to read why you might be interested in protecting that investment against....

Consider the convenience of having all your insurance with one company. You'd have only one agent to handle all the paperwork and hassles—along with the biggest advantage of all, an objective look at your real needs.

Please call us at our new toll-free number (1-800-444-7777) to get your free copy of.... This is the first such listing you can use immediately to contact....

I'm sending this to your home to alert you to a serious situation developing in the workplace. I'm referring to the recurring accidents during the last few months. We're all fortunate that no one has been seriously injured, but the potential for injury and costly damage is there. You have two options with regard to your safety and financial protection:....

► **Explain the benefits of what you have to offer.**

We can take the risk out of evaluating new equipment for your factories. As part of our service to you, at no cost we will....

Have you heard of the Huffton line of copier supplies? If not, maybe you're not aware that now you can....

We have four ways to help you reduce current operating costs and to capture savings on future equipment purchases. First,....

The most compelling reason this program works is that the framework design allows you to....

Almost every organization can benefit from the increased speed in...and the decreased chance of confusion in....

Our business has grown to serve more than 300 clients in 42 states. What that means to you specifically is the convenience of....

You will find this offer unique to our company. Only our customers have the option of....

- ▶ **Either ask for the order immediately—by phone or mail—or tell readers how they can investigate further. If your product or service is not one they'll make an immediate decision about, then identify the next step for them in the buying process. Should they see a demonstration? Attend a meeting? Ask for literature? Call some references? Visit your trade-show booth? Set an appointment with a local representative? Fill out a survey form for a customized analysis of their situation?**

If you would like to discuss alternatives available to you in manual design, I'd love to drop by and visit with you further (call me at ext. 4589). I can bring along several samples of manuals we've put together for other clients. At the least, you could pick up some ideas for new programs you plan to develop for the upcoming year.

We will appreciate the opportunity to share with you our professional experience in making the decision you're facing. May we help?

We can set up a demonstration in your office so that all your staff will see the results firsthand.

I invite you to take a risk-free look at the directory. We've copied and attached a few pages of entries so that you can see for yourself what kind of information you'd have at your fingertips. Call us today and we'll ship the complete directory tomorrow.

All you need to do is call 1-800-123-4455 and ask them to put you in touch with your local representative. He or she will be happy to meet with you at your convenience to outline a systematic approach to stocking your various locations.

Simply return the enclosed response card, and we'll put some additional information in the mail to you. For example, we have some statistics that you can compare to your own in the area of....

If you'll answer the six questions on the enclosed survey, we'll send you information for your specific situation. Then if you're still intrigued about the savings involved, we'll send out one of our agents to sit down with you and go over the costs on an employee-by-employee basis.

If you'll just attach your business card to this letter and return it in the enclosed envelope, we can give you some information that will help you make that decision.

For a copy of a special report that contains some of the key industry statistics, simply call us at 1-800-432-0000 and we'll send it by return mail.

We'll offer you a free estimate on your move and answer your questions at no obligation. What have you got to lose?

We have other similar events scheduled for the next quarter. If you'd like to be our guest at one of these seminars and learn more about..., call ext. 4889 to reserve a seat.

Just jot us a note on the bottom of this letter and return it. We'll be glad to add you to our mailing list for receiving updated information and prices.

We have a video that will give you more details about the commitment involved if you decide to join us. Call me or Andy Reece at the above number and we'll put one in the mail to you immediately. Then you can really say you've made an informed decision.

- ▶ **Whatever you're introducing, get to the point quickly, and be clear and specific about the new product or service. Too many readers finish an entire letter with only a vague understanding of what the writer has to offer.**

Introduction of Product/Service (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Grogan:

We would like to refer your company to some of our clients.

We are a conference meeting site and recently have expanded our services to act as a consultant “clearing house” for corporations who frequently use our facilities for meetings. Clients often come to us to ask if we have heard of firms that present programs on this or that topic. We’d be pleased to add your name to the list and distribute your promotional material to appropriate inquiries.

What’s in it for you?

- Opportunity to make your presentation to some of the largest corporations in the nation
- Leads sent to you on all those who have asked for your area of expertise
- Contact name and phone number of the “right” people who can make a decision about your service

What’s in it for us?

- Promotion of our “full-service” meeting site
- Interest from you and your clients in our meeting site

We hope you’ll agree that it makes sound business sense for us to develop a good working relationship. If so, please send us several copies of your promotional material so that we can promote you properly.

If you have a chance to visit our facilities, please call me (234-5663) and give me an opportunity to show you around personally.

Sincerely,

Introduction of Product/Service (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Crawford:

Are you paying too much for group health insurance? We can help you through the maze of carriers when it comes time to price group insurance coverage by doing the shopping for you. This service costs you nothing.

Mettle and Associates is an insurance brokerage firm that specializes in employee-benefit design. With ten years' experience in the field, we pride ourselves on the ability to offer quality health coverage at very competitive rates. With your protection in mind, we deal only with A-rated carriers. And unlike some other agents, we aren't tied to one company for our commission; we can act independently in your best interest.

Let us do the leg work for you—we'll make a cost comparison at no obligation to you. At the bottom of the page, simply fill in the name of the appropriate contact person in your company, along with his or her phone number, and we'll go to work for you.

Sincerely,

Introduction of Product/Service (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Silverman:

Is a loyal employee who's been consistently productive worth five minutes of your time?

Five minutes...for me to show you how you can recognize loyal service, outstanding performance, or a great idea...with the most wanted employee award: Accutron by Bulova...the only quality timepiece made in America.

As your local Bulova Territory Manager, I'd like to tell you about the experience of many companies, large and small, including... IBM, Texaco, Goodyear, Equitable Life, Western Electric, Eaton, and divisions of General Motors... companies who thought enough of their employees to let them select their own service awards.

Result: More than 80 percent of employees chose Bulova timepieces over all others.

Bulova products represent prestige and quality. To your employees, they say "thank you" more meaningfully than any other award you could give.

But whether you currently have an awards program or not, the material I'll bring you will prove extremely useful in your employee planning.

I will call in a few days for an appointment. If it's not convenient for you to see me personally, perhaps another member of your management team would be available.

Very truly yours,

Reprinted with permission courtesy of Herb Seligman and Bulova Watch Company.

Lead-In to a Phone Call or Appointment: Guidelines and Alternate Phrases

- ▶ **Mention any earlier contact such as a referral or the reader's response to a product/service mail-back card.**

I understand you are considering the purchase of a new computer system. Since you seem to be unhappy with your current computer vendor, I hope that you'll want to explore all the alternatives before you make another purchase. Were you aware that we offer....

We received your card expressing interest in more information on investments particularly suited to IRAs.

Thank you for taking the first step toward learning about our latest investment recommendations. We received your card asking for further printed information.

Harry Butler and I had lunch a couple of weeks ago, and he suggested that I get in touch with you about your possible interest in our accounting services.

As I'm sure you've heard, our company is now part of Buford Manufacturing, and as such, we have been looking over each other's shoulders for our customers' interests in broader issues. Therefore, I thought I would drop you a note to let you know....

- ▶ **Summarize the key benefits of your product/service that will be of interest to this specific customer.**

- ▶ **Add an air of intrigue to the details of your proposal.**

I think that you will find that we've added quite a few new services which can assist you in fulfilling your aims for 19—.

I think I can share some market research with you that will be quite thought-provoking.

I hope I can stimulate your thinking in an exchange of ideas, including what I learned on the international front during my recent trip to the Far East.

I think my most recent experience with another, smaller client could be helpful to you on this project. On that job, we ran into the same issues you're contemplating now in your own situation.

► **Mention that you will be calling to talk further on the phone or to set an appointment.**

I'll be calling when I get to Boulder and will be delighted to set up an appointment at your convenience.

If you are not attending the convention but are interested in discussing these services, give me a call to arrange a convenient appointment.

I'll be in New York October 12-14 to assist another client company in relocating to West Gables this fall. While there, I would welcome the opportunity to visit with you further about the new developments, which I think may be of interest to you. I'll call when I arrive.

Paul, I'd really like you to take a long look at this equipment. If you're interested, would you phone me this week (345-6882) so we can arrange to get together?

Carrie, let me know if I can answer other questions. In fact, I'll phone you next week. So if you'll just keep a running list of things that come to mind as you browse through the enclosed information, I'll set aside all the time you need to answer them.

Jim, I'll be in touch with you in the near future and would appreciate a shot at your business.

Lead-In to Phone Call (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Klohe:

House Bill No. 1589 has passed through the Health and Human Resources Committee and is now being debated on the floor of the Texas House of Representatives. If enacted, this bill would modify the Texas Human Resource code regarding nurses aides at nursing facilities. It would require at least one nurse aide to be on duty for every 8 residents during a morning shift, at least one aide for every 10 residents during an afternoon shift, and at least one aide for every 14 residents during a night shift. It would also prohibit nurse aides designated as a member of the nursing staff during a shift from performing tasks unrelated to direct care, like food preparation, housekeeping, or laundry.

This new bill, which seems likely to be passed this session, will result in considerable changes in scheduling for many nursing homes and mental health-care facilities. For such facilities, an increase in maintenance staff without nurse aide certification will be required. Increasing nursing staff through temporary and contract workers may be helpful in offsetting the costs of these new employees.

We at Flagstaff Medical Personnel believe in keeping you, our clients and prospects, informed about such restrictions and qualifications of concern to you. This is just one example of the ongoing, relevant, up-to-date service we give at Flagstaff. Please call me with any of your staffing needs.

Sincerely,

Lead-In to Phone Call (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Smith:

- Meeting OSHA requirements means drafting a quality control and assurance plan for every project.
- State and federal laws require that every employee who works with hazardous materials receive a total of eight hours of training by a certified instructor.
- State law requires that workers who come within 200 feet of hazardous materials receive the state's three-hour hazardous materials safety course, even if these workers never come in direct contact with the materials as part of their job.

These are some of the key problems we at Environs Associates can help you solve. If you would like to find out how, please call me today, toll-free, at 1-800-555-4532. If I don't hear from you within the next few weeks, I'll assume you have no current needs in these areas and will be back in touch in a few months to see if your situation has changed.

Sincerely,

Lead-In to Phone Call (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Martin:

In today's competitive world, managers have realized they can no longer sit back and wait for buyers to come in the door. They must communicate about their products and deliver quality services more effectively, efficiently, and productively than ever before.

We at Merrisale, Inc. can help you develop the strategies to make your organization successful. With changes in the economy, technology, and legislation occurring almost daily, many executives have been tempted to overlook their advertising plans. "How can we plan for next year when we can't even be sure of next week?" is a common question.

But such an environment makes it more important than ever to have a plan to guide decisions about new lines of advertising. Many companies know they need to advertise, but the cost is usually considered prohibitive. We have an option we think you'll consider more than reasonable.

Merrisale, Inc., a five-year-old firm based in Portland, is known for high quality and innovative advertising products and services. We have the technology and expertise to show you how to advertise your products on a regular basis in a cost effective manner.

Should you need this service, we will be happy to put this knowledge and experience to work for you. We invite you to take advantage of our special packages:

- Bundled ads in industry-specific publications
- Coordinated radio spots in your market
- Discounted newspaper ads
- Specialty items to distribute to your customers

I'll phone next week to see which of these products and services makes more sense in your specific situation.

Sincerely,

Lead-In to Phone Call (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Tunbow:

When Fred Grimes and I visited with you last summer about the Boston construction project, you expressed interest in our Management Diagnosis program.

You may recall that this program involves one day of administration with your top management team to develop a composite of their thinking about the company's present situation and to identify 20 crucial issues for future growth. Feedback of what your team has said in the form of a written report follows in ten days.

The program is designed not only to complete what is generally considered a management audit but also to develop the best attitude within the team about the future.

I will appreciate an opportunity to pursue our previous conversation about this program. I'll give you a call in the next week or two and see if you still have some interest in this kind of help.

Sincerely,

Lead-In to Phone Call (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Robert:

Bobby Greensmith suggested that I write you about your interest in multimedia and, specifically, to address how we might achieve mutually beneficial goals.

Enclosed is some information on our interactive software and multimedia development services. I'll call you on Tuesday, January 21, to get your reaction and to decide what the next step needs to be. I look forward to our conversation.

Cordially,

Lead-In to Phone Call (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Carl:

Many of our customers are caught between the increasing demand for new data processing equipment and shrinking budgets.

If you find yourself in the same situation, I'd like to remind you of our leasing terms. These long-term leases can be structured for up to five years, and the firm monthly payment protects you from any price increases. By installing your equipment under a lease contract, we can replace your 245 with a 390 and save you over \$500 each month. Other new features and options are detailed on the enclosed brochure.

I'll be calling you on May 5 to discuss this unusual opportunity to "have your cake and eat it too"—new equipment at a lower price.

Sincerely,

Lead-In to Phone Call (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Landon:

To work together on your local area network would be an honor for me and a service to you.

As a computer network consultant with CompuLinx in Portland, I feel that attention to your needs, goals, and objectives is where you and I can distinguish ourselves as a success. I adhere to a plan that the client and consultant agree upon from the beginning, one that's monitored and revised when necessary, given changing opportunities and objectives.

Enclosed is literature on our network management philosophy and qualifications. You can expect a call from me in the next few days to discuss our opportunities in more detail.

Respectfully,

Lead-In to Phone Call (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Burton:

Have you given any serious thought to your future requirements for accounting software? Having worked directly with some of your employees (Darrell Graham, Bob Holland, and Eva Plume) prior to joining Universal Software, I am somewhat familiar with your company and its needs.

I'm enclosing literature on our newest software programs and would like to schedule a meeting with you to conduct a free needs analysis. I think you'll find this exercise quite helpful as you plan for your future software needs—specifically in cost planning and order processing.

May I visit with you further about this? I'll phone next week.

Sincerely,

Lead-In to Phone Call (Example 9)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Tarrant:

Securing the necessary services that enable your business to thrive is often a difficult task. We at Finance, Inc. want to introduce you to a cost-effective way to run your business.

We can show you, as one of our clients, how to:

- Invest in an effective and profitable 401K plan that will benefit your management team as well as your staff
- Implement an aggressive, yet conservative health and life insurance plan that will provide attractive compensation for current and new employees
- Work with the upcoming tax issues in Northern Virginia

The following is a list of some of the services available to you through Finance, Inc.:

- Professional Money Management
- Health and Human Resources Management
- Investment Brokerage

Enclosed you will find a brochure briefly describing our complete services and programs. I will be contacting you again soon to discuss how we might help you grow.

Sincerely,

Lead-In to Phone Call (Example 10)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Neighbor:

I recently moved into Suite 480 and thought this letter might be the best way to introduce myself without infringing on your valuable time. If you're around my way, please drop in; I would enjoy meeting you personally.

We operate a small public accounting firm with concentration in manufacturing management consulting, tax planning, and complete small-business services. If I can ever be of assistance to you or any of your clients or associates, I hope you will keep me in mind. I certainly will do the same when I have had a chance to learn more about your business objectives.

I look forward to meeting the person behind the company.

Cordially,

Lead-In to Phone Call (Example 11)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Lydgate:

If you ask your administrative employees, they will probably agree that copier maintenance is critical to a successful office. Our research shows that the typical business will use copy equipment about six months before repairing or replacing it. Historically, when you have needed service the only option has been to call a repairperson at a cost of \$_____.

There is now a service that can extend the life of your copier and save Blaine Industries thousands of dollars during the next year.

PaperWorx specializes in outsourcing copier maintenance and has successfully served business and legal firms throughout the United States. We can significantly reduce your maintenance costs and your downtime.

The enclosed brochure outlines these services in detail. If you have questions concerning PaperWorx or want information on companies already using our services, please call me at our toll-free number, 1-800-555-1212.

Mr. Lydgate, I look forward to talking with you about saving Blaine Industries some money.

Sincerely,

Lead-In to Phone Call (Example 12)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Grayson:

Do you find yourself in need of a secretary, but your cash flow says “no” to hiring a full-time person with experience? Does your company just not have enough work to keep a full-time secretary busy? If so, I have the solution for you. Now you can have the benefit of an experienced secretary without having to pay for idle time. Let me explain.

The services I can provide are endless. With over 20 years of office experience, I can offer quality word processing, typing, and many other related services at a very affordable rate.

I’ve enclosed letters of reference from some of my small-business clients, and I hope to add your company to that list of well-served businesses. I’ll phone you in a couple of weeks after you’ve had time to assess your needs to discuss how we can help you use your time and cash flow more profitably.

Sincerely,

Lead-In to Phone Call (Example 13)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Axley:

The heartbeat of any business? Communication and an obsession with excellence. Excelsior Automation of Detroit brings a level of commitment to excellence in assembly-line artificial intelligence systems unmatched in the state.

We are committed to helping you extend your performance, strengthen your productivity, increase your profits, and improve your service.

The industry has rebounded. Excelsior Automation is proud to be a part of the new energy, the can-do attitude in our part of the country. We would like the opportunity to discuss your assembly-line automation needs and demonstrate how Excelsior Automation can help you operate to your highest potential. I look forward to talking to you within the next few weeks.

Sincerely,

Lead-In to Phone Call (Example 14)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Slupeski:

I want you to know of our continued interest in providing you with printing and document reproduction services.

High departmental costs and poor quality continue to plague many companies of your size. If either of these problems is a present concern to you, Gilson Printers would like the opportunity to provide you with some options to reduce these costs while improving quality.

Gilson is a privately-owned company providing quality printing service to businesses such as yours. We currently employ over 120 people servicing 11 locations in 3 states.

May we talk in person so that I can explain the different programs we offer? I will contact your office the last week of November to determine a convenient appointment time.

Sincerely,

Lead-In to Phone Call (Example 15)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Koos:

Lemonrose and Sons guarantees to improve your company's delivery performance within six months. Our cost-free analysis provides you with an excellent means of evaluating this promise and guarantee.

Throughout the country, organizations such as yours are facing declining margins and increasing competition. In response, many are aggressively working to improve the management of their existing resources.

We can help with scheduling, warehousing, and delivery services to maximize the profitability from the distribution of your product.

Lemonrose has the staffing, storage, and vehicles necessary to improve the speed with which your product reaches your vendors to increase their satisfaction and your profits. And we guarantee results. Let's talk next week (I'll phone), or if you have questions before then, call me at 1-800-555-8675.

Respectfully,

Lead-In to Phone Call (Example 16)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Scheider:

Keeping track of contacts, appointments, and daily schedules gets harder every day, doesn't it?

Good news: On March 5, InfoTech will introduce *Online Assistant*, software that can help you stay on top of your busy schedule.

You can forget about calendars and address books. Instead, this new personal information manager now enables you to keep track of your personal and business contacts, schedule activities, prioritize your daily duties, and remind you of important events. Integrated fax software even allows you to schedule faxes to be sent through your modem!

As the new sales manager in your area, I didn't want to let my customers down by not giving advance notice on the availability of *Online Assistant*. I'll plan to talk to you further about the details when I phone April 4.

Sincerely,

Lead-In to Appointment (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Moffett:

I think we can provide you with a solution to reduce operational costs by 11 percent with better telemarketing techniques. Conservatively, the Woodward Company in the Springfield area can save \$70,000 annually.

Would you be willing to meet with me on April 11 to discuss the telemarketing system currently being used by your company? I'd like to share with you the merits of implementing our solution in your territory.

I'll phone your secretary to ask if this date is appropriate for you, or if we can set up some other, more convenient time.

I am excited about the opportunity to work with you in helping manage that bottom line.

Sincerely,

Lead-In to Appointment (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Satchmo:

It was a pleasure to have briefly talked with you again. I hope that your vacation was a relaxing time for you and your family.

I have enclosed a brochure and price list on the communications software. These packages have consistently been rated superior by the worldwide communications community. Needless to say, I would appreciate an opportunity to come to your office, or you to mine, to discuss your situation and how I can help you fulfill your goals.

I know your time is short. My calendar is rather open the week of June 5 through 10. Can we set a convenient time for you? Please phone me at 212-555-5555.

Sincerely,

Lead-In to Appointment (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Catleon:

ABC Company currently offers two new versions of high-speed copiers that can solve your copying needs:

- The XTL5 model offers low-cost 12 page per minute color output, which is twice as fast as Xenon's TL1 Model.
- The XTL8 model not only provides color-proof quality at half the price of our competition, but it also can be networked to your PC to double as a printer.

If my research on your company is accurate, the XTL8 model can help you copy and color proof documents in a more efficient manner.

I will contact you within the next two weeks to let you know about availability dates and determine the best method to have you and your staff see a demonstration.

Respectfully,

Lead-In to Appointment (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Cannatious:

We have received multiple vendor requests for information about nutritional supplements. Therefore, we've summarized below a few general guidelines as helpful hints to you:

- The latest Vita-Day Pak provides not only essential anti-oxidants, but a large dose of the B-complex family. When recommending this product to your customer, make sure that they understand that the Vita-Day Paks must be taken every day for at least 3 weeks to achieve maximum results.
- The children's chewable supplements are now available in mixed fruit flavors. Although this product is expensive, it is important to communicate to your customers that the vitamins are all natural, contain no sugar, and are absorbed by their child's system 3 times faster than the leading competitor's.
- Our training snack bars are now available in low-fat. Each bar contains only 2 grams of fat, but still provides the same essential nutrients found in our regular training snack bars. Remind your customers that although the low-fat bars have much less fat and are still delicious, they may want to consider limiting their intake to no more than 2 bars per day.

Although these guidelines are provided primarily to our current vendors, we hope you also find the information useful. If you feel that we should get together to review your situation (with no obligation on your part), please contact us at 512-555-5555.

Sincerely,

Lead-In to Appointment (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Landilack:

The recent article in *The Gazette* about SmithCo was impressive. The phenomenal success and growth you have experienced in such a short time have undoubtedly presented many challenges along with the rewards.

As a growing firm, you are probably confronted with finding better ways to manage your business and control your costs.

Just a few months ago, we helped Ratchetsoft, another firm that was experiencing similar growth, with their warehousing opportunities. Their new inventory system has already resulted in a significant increase in their profit margin.

These opportunities and others may be possible at SmithCo. Let's get together to discuss your present operating plan and some new possibilities.

I will phone you on Monday morning to set up an appointment.

Sincerely,

Lead-In to Appointment (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Jones:

Janet Ismus suggested that I contact you about your interest in our packaging and fulfillment services. She and I have worked together for the past 3 years in supplying her company with product boxes and assembly.

Therefore, I've taken the liberty of enclosing a brochure about my company and our most recent offerings. You'll note from the brochure that our turn-around time for assembly of most units is less than 48 hours with a proven flaw rate of less than 1 percent.

I'll call in a couple of weeks to arrange an appointment to talk with you further about your fulfillment needs. If you'd like additional information before that time, please phone me at 512-555-5555.

Sincerely,

Lead-In to Appointment (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mrs. Hightower:

Although you were not able to see us during our recent visit to Aerodyne in San Mateo, I did want to confirm our interest in supplying your office supply products.

I also want to mention that we are pleased that Candice Edelberry, formerly with Office It, is now associated with RealOffice Store products. She will service customers on the West Coast through a warehouse facility established in the California area. We are confident that this recently developed association will offer quality products and service to you and other firms on the West Coast.

Candice hopes your schedule will permit her to visit with you during her next trip to San Mateo. She will telephone you to make an appointment prior to leaving.

We look forward to introducing our products to you firsthand.

Sincerely,

“Reminder” to Buy: Guidelines and Alternate Phrases

- ▶ **If this letter is following up a successful sales call or meeting, thank the reader for taking time or making the effort to talk with you.**

Thank you for a most enjoyable chat last week about your upcoming software decisions.

I was happy to have the opportunity to talk with you on Monday. From your comments about the incompatibility problems, I thought you might like some additional information on the WWT. Therefore, I've gone back through my files to get the announcement memos for the WWT so that you can get a better perspective on that product.

Thank you for talking with me this morning and giving me an update on your activities. We value your business and look forward to continuing our strong relationship.

Thank you for your time yesterday.

- ▶ **Reemphasize the key benefits of your product or service to the customer.**
- ▶ **Suggest the next action step: Your plans to phone again for a decision. Submission of a proposal or quotation. A phone call from the reader. A free demonstration or an “on-approval” arrangement.**

I've investigated the pricing arrangements we discussed. Here's what I've found:...

Please let me know what other information you need to finalize your decision. I'll phone again Friday.

I'm making a calendar note to call you again in the fall to see if you might be free to attend another seminar like the one you just missed.

- ▶ **If you are writing to gather information necessary to complete the sale, be specific about what you need, including amounts, names, or approval signatures. You may briefly mention why you need the information if the reason is not obvious so your reader will understand the need to provide the correct information quickly.**

Have you had time to investigate your needs further? What have you decided about...?

“Reminder” to Buy (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Sharp:

Jim Hankins and I certainly appreciate your time and interest in allowing us to visit with you on such short notice last week.

Enclosed for your consideration is a binder of Greenwich Cleaning Systems literature:

- High-rise window cleaning
- Hard floor care
- Carpet cleaning

This information should be useful to you as a future reference on office cleaning and maintenance.

In order for your custodial staff to evaluate our products objectively, we believe a demonstration would be quite beneficial. By conducting such a demonstration, I can properly describe the unique features of each of our products, as well as their advantages and benefits.

If you agree that such a demonstration has merit, please phone Jim or me. We will be pleased to schedule the demonstration just about any week you prefer.

Cordially,

“Reminder” to Buy (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Jack:

We discussed last week some of the delays we're having with the racing bicycle you wanted. I still think, however, that it's important to move ahead with a final pricing proposal so that the information is available when you are ready to make a decision.

Our pricing of this custom product is in many ways a reflection of the amount of information you are able to provide us at the outset. Could you please review the list of questions below and let me know what you decide?

- Is a graphite frame necessary, or would you be happy with a chromium molybdenum frame? For the type of riding you indicated you would be doing, I recommend double-buttressed CroMoly.
- Would you like side-pull brakes or center-pull brakes? You mentioned Campagnolo, who is known for the side-pull.
- Should the crankset be Shimano or SunTour?

Any help you can give us with these answers will move us closer to the design that best meets your needs.

Regards,

“Reminder” to Buy (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Hanson:

Selecting a hard drive vendor is a lot like choosing a business partner. You need a partner with a sound reputation and a proven track record.

We've been offering large capacity drives since 20—. Our products are being used in over 125 businesses in the New York area alone and in over 275 locations worldwide. As manufacturers ourselves, we have focused our research and development to give you, our valued customer, the competitive edge.

I invite you to talk with companies using our data storage products. Ask them the tough questions: “Does Datacare take the time to understand your business? How responsive are they? Does Datacare care about the success of your company? If you had to do it again, would you choose Datacare?” I think you will be impressed with the answers.

We look forward to the opportunity to demonstrate our quality products and services. May we schedule such a demo next week? Please phone me at 1-800-555-DISK if you're ready to learn more about Datacare's hard drives and storage media.

Sincerely,

“Reminder” to Buy (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Morrison:

Still looking for a good travel agent with competitive rates and excellent service? Just fill out the enclosed card or give me a call at 512-555-2342.

Sincerely,

“Reminder” to Buy (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Tigrette:

I'm looking over the list of folks who responded to our off-season sale on our swimming pools, and I see that we haven't yet given you the free residential inspection and estimate that you asked for. I don't know if this was an oversight on our part, or maybe the timing just wasn't right for you. In any event, I want to make it up to you right away!

Please return this letter in the enclosed return envelope by February 2. We'll pay the postage and see that you receive priority status. We'll immediately call you to set an appointment at your convenience. One of our representatives will come out to inspect your home, give you straight answers to your questions, and deliver you a precise estimate. Of course, there's no obligation to purchase—just an exceptionally affordable price for a smart investment.

Please return this note to me today, and we'll be out to talk with you next week.

Sincerely,

“Reminder” to Buy (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Sarah:

I have enclosed a new brochure highlighting the two new features you expressed interest in when we last talked. Both should provide exactly the help you need with your customer survey projects.

In order to ensure the availability of equipment in the requested September time frame, our team must place your equipment order as soon as possible.

Once you have reviewed these data sheets, please phone me at 555-8989. I think you'll be as eager as we are to move ahead with the order.

Sincerely,

“Reminder” to Buy (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Springall:

A short time ago, we discussed the brand new program that will allow your organization to purchase our cables at a 15 percent discount. At that time, the program was so new that we did not have an agreement package we could use to demonstrate. We now have such a package, and I've enclosed your agreement.

As you will remember, you will receive a rebate from the manufacturer to help defray your cost of the initial set-up. There is no minimum quantity you must order, and you can order units at any time you wish.

All we need to get started is for you to indicate your acceptance on the enclosed agreement, and we will assign a coordinator. Once we have received your acceptance, we will arrange a product demonstration for all your staff.

Sincerely,

“Reminder” to Buy (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Mayes:

EcoEquipment is now offering a FREE TRIAL of our on-site PCP soil testing equipment for two to three months, with no obligation to buy. You can see for yourself the benefits that other firms such as yours are gaining from our sample tester, benefits such as:

- Higher accuracy using fewer samples
- Ease of use and portability (the entire unit is under 15 pounds)
- Compliance with EPA testing requirements

We are not trying to change or replace any of your current EPA compliance operations. Instead, we want to augment your organization’s activities where we can provide a smooth, cost-effective solution. Our company has worked very hard to offer the types of products that can help meet the competitive challenges of the future.

We are convinced that it will be in your best interest to evaluate these products now. I’ll contact you in July to see if you agree.

Sincerely,

“Reminder” to Buy (Example 9)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Veronica:

I have enclosed two samples of business stationery I'd like you to try.

The first sample is a 20-lb cotton blend. The second alternative is completely made from recycled paper.

I am looking forward to hearing your comments on these materials and will be back in touch shortly.

Sincerely,

Requesting a Referral from a Customer: Guidelines and Alternate Phrases

- ▶ **Recall your past association with the reader, if necessary, such as a meeting or a history of successful business.**

I enjoyed our short airplane chat last week on the way to Los Angeles.

- ▶ **Outline briefly your services or products and the target customer or client.**
- ▶ **Thank the reader for any referral he or she may have occasion to give, and include any mutual benefit that you foresee.**

If you have occasion to mention our company, we will greatly appreciate it.

Thank you in advance for any referrals that you might send our way.

If you have an opportunity to refer us to someone, we will very much appreciate your taking the time to do so.

If any of your acquaintances express an interest in our products or services, be sure to let them know of us. We will thank you.

Do you ever run across anyone in need of placement services? If so, I'll appreciate your giving them my name.

As I see it, you and I sell complementary products to the same customer. Seems to me that whichever of us gets to the customer first should suggest the next logical step in the set-up process. Can you envision a way that we could construct a mutually beneficial referral arrangement?

Thank you for passing on any of my information to interested colleagues.

Do you think it would be to our mutual benefit to set up a formal arrangement for commission referrals?

I'll appreciate it if you can pass my name along to anyone who might be interested in this service, and I'll do the same for you.

I'd like to work out a mutually beneficial arrangement for referrals. Do you have suggestions?

I'll appreciate your referring to me anyone who needs such services.

Requesting Referral from Customer (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Wratchet:

Thank you for taking the time to talk with me last week about our contracting services. As I promised then, I've enclosed several copies of our brochure that details the various services we provide to businesses such as yours.

Our target audience is that group of businesses that have outgrown the "let everybody do their own thing" stage and need help in personnel management. Although you yourself seem quite knowledgeable about human resources, perhaps some of your colleagues in other firms are not so fortunate to have that expertise on staff.

In those situations, we will appreciate your mentioning our name and even providing one of the enclosed brochures. Or, you may find it easier to phone us (1-800-555-1213) and we'll follow up your lead.

Thank you for being so helpful to us, as well as to the referred colleague.

Sincerely,

Requesting Referral from Customer (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear George:

I've appreciated your business and our working relationship during these past months as we've worked on your industrial development project. From your comments throughout the process, I assume you have been pleased with our builder's performance and our related services.

If that's the case, may I ask a favor? Would you please let me know if you have colleagues either within your company or elsewhere who could benefit from our contracting services? If so, I'd like to use your name as a reference and contact them to talk further about their needs. I've left a blank space at the bottom of this page for you to jot the contact information.

Thanks for any leads you can give me.

Cordially,

Requesting Referral from Customer (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Jose:

Thank you for your enthusiastic reception and comments about how our CandiceCo copiers have helped you to:

- Eliminate 60 percent of your waste copier paper
- Cut down on toner costs
- Produce crisper copies

On the chance that you know of friends or other business associates who could also profit from our working together, I've enclosed a couple of extra brochures and business cards you may want to pass on to them.

I appreciate your business and want to contribute to your success as you have to mine.

Cordially,

Response to Ad Inquiry: Guidelines and Alternate Phrases

▶ **Thank the reader for the inquiry.**

We are glad to learn of your interest in our products.

Thank you for letting us know of your specific needs. We are happy, of course, to supply you with the information you need.

We are pleased to receive your letter asking for information about local distributors.

▶ **Mention immediately the information you are providing.**

We are pleased to enclose....

We are mailing you separately....

Shortly, you will be receiving....

Today I have mailed....

▶ **Mention any requested information that you can't send and explain why.**

Such information is confidential, and therefore, not available for distribution.

We regret that we simply do not have the available staff to research the kind of information you need.

Although we would like to provide this information to all our vendors, the cost is quite prohibitive.

▶ **Offer to help the requester in some other way. What information can you provide? Can you refer the requester to someone else who may be able to help?**

I'm forwarding your request to Joe Bitten, hoping that he may be able to answer your last two questions.

In an attempt to give you at least a partial answer, I've enclosed....

▶ **Express appreciation and invite further inquiries if that is appropriate.**

Let us know if this doesn't answer your questions fully. Thank you for asking.

Thank you for giving us the opportunity to provide the information upon which you can make a decision. We hope to hear from you again soon.

I hope this helps. Thank you for your letter and feel free to write again.

Response to Ad Inquiry (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. McDonald:

Enclosed is the sales and technical information you have requested on Evergreen fertilizer. Although we have been manufacturing Evergreen for several years, the response we have received from our recent trade magazine ads has been overwhelming.

In addition to the product literature, I am mailing separately a small sample so you will have a better understanding of Evergreen.

Evergreen features easy application and fast results.

Over ten million bags of Evergreen were sold last year alone, and the feedback includes comments such as "fast and easy to use," "half the price of Staygreen," and the list goes on.

We ask only that you try Evergreen to see why so many companies are switching from Staygreen to Evergreen. Not only can you realize a cost savings in the initial purchase, but you can install Evergreen in a fraction of the time.

Our regional distributor for your area is G & S Distributing, and I have asked the representative who will be handling your account, John Wagner, to contact you with pricing information.

I hope you find the information enclosed helpful. If I can provide further assistance before your local rep calls, please phone me at 804-328-4176.

Sincerely,

Response to Ad Inquiry (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Carroll:

Thank you for your recent interest in StaDry products listed in the Roofing Materials directory.

In order to qualify your interest in specific StaDry products and to determine if our product meets your needs, I have enclosed some general information about our products and our company. Although our products are manufactured in Dayton, Ohio, we coordinate sales for the United States from our Cleveland office through regional distributors. The distributor nearest you is TipTop Roofing Supply, located at 400 Main, Boise, Idaho 34782. That phone number is 401-532-8050.

After reviewing the enclosed literature, please write or phone me again at 632-479-4755 if you believe our products might be of further interest to you. I can forward more specific information once I know your specific needs. Thank you for your inquiry.

Very truly yours,

Response to Customer After Losing a Sale: Guidelines and Alternate Phrases

- ▶ **Express appreciation for the opportunity to present your product or service to the reader.**

We are pleased to have had the opportunity to provide your long distance service.

Thank you for allowing us to bid on the mechanical systems for the Southfield project.

We enjoyed working with your staff to develop the prototype emergency generator and value your confidence in our design service.

- ▶ **If you are writing to ask why the reader did not choose your product or service, let your request show that yours is a company that is concerned with customers' needs and opinions. Such concern will speak well of you in future bids and proposals.**

While we understand your decision to choose a another supplier, we would like to be considered for future projects. We believe that we can provide faster and more cost-effective service than any of our competitors and would welcome an opportunity to prove it to you.

- ▶ **Make it easy for the customer to reply.**

Would you phone me (234-5567) personally to let me know if there is something about our product or service that needs attention?

Could I impose on you to jot me a note on the bottom of this letter to let me know how our services could be improved to better meet your needs?

The enclosed, stamped card is for your convenience in letting us know what motivated your decision.

- ▶ **You may take advantage of this letter to interest your reader in another product or service.**

We have a smaller, less expensive lawn tractor that might serve some of your smaller complexes, and will arrange a demonstration at your convenience. Just call me at 453-9875 when you are ready.

If you are planning some smaller projects, our commercial division is studying a marketing concept that might be of interest.

- ▶ **Mention that you are interested in preparing bids or doing business with the reader in the future.**

Please keep our name on your list of possible bidders. We will do our best to win a future contract.

Should you have an additional need for circuit boards, please let us know.

We hope to be able to work with you in the future.

Response to Customer After Losing Sale (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Johnson:

We fought hard, and evidently we lost, in our efforts to get you to agree that SteamKlean is exactly what you need to solve your carpet maintenance problems. Despite our disappointment, we thank you for allowing us to talk with you and propose our Jiffy products.

As you probably realize, we like to follow up on the reasons behind our failures as well as our successes. Would you be kind enough to take the time to phone me at 201-456-8379, ext. 1401, or jot a note on the bottom of this letter telling us why you decided against our Jiffy SteamKlean?

Thanks for any help you can give us to improve our presentation of the Jiffy SteamKlean to future customers. We really do think we have the finest product available.

Cordially,

Response to Customer After Losing Sale (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Grainger:

Thank you for giving us the opportunity to propose our products and services. It's clear that your decision to purchase was reached after much deliberation.

Because you will be actively involved in the development and presentation of the Town Centre project, please give serious thought to using one of our related products—our Parking Lot Striper. It truly is one of the best stripers available today for retail centers.

Good luck with your efforts. Although we were not selected to help you with your current bumper stop needs, we sincerely appreciate being considered and look forward to helping you sometime in the future.

Sincerely,

Thank You for Buying: Guidelines and Alternate Phrases

- ▶ **Thank the customer for the recent purchase or welcome the organization as a client.**

Thank you for your recent order from us.

We appreciate the confidence you've placed in our organization by opening a new account with us.

Welcome to Hartford Bank. We are so pleased to have the opportunity to provide banking services to you.

Thank you for giving us the opportunity to show you what we can do to service a car properly.

We welcome you as a new client. We've scheduled your first appointment on September 9, as you suggested.

- ▶ **Highlight one or two key benefits of the purchase or the working relationship.**

Our store is open when you're ready to shop, be it early morning or late at night.

Our capable staff has the proper training to deal with the routine and the unusual needs that might arise.

Our convenient locations throughout the area should make it easy for you to take advantage of....

We can provide the necessary security at the lowest possible cost.

Our people are trained to know the appropriate questions to ask and the pitfalls to avoid in assisting customers with their buying decisions.

Remember to use our toll-free 800 number when you have any question at all about service or scheduled maintenance.

Help with support services is just a telephone call away.

- ▶ **Express your expectation for a mutually beneficial partnership and your appreciation for customer loyalty.**

We look forward to working with you for years to come.

We anticipate a mutually beneficial relationship in the marketplace.

We're eager to win your confidence all over again every time you call us for advice and service.

Our two firms have much in common; I'm looking forward to a very profitable working relationship.

We will work very hard to deserve your business.

We will work very hard to deserve the confidence you've placed in our employees who service your account.

You deserve the best, and we aim to give it.

Our aim is to provide the high quality service you deserve.

We appreciate your willingness to let us show you what we can do. We don't intend to disappoint you.

We appreciate the opportunity to provide this service to you. You won't be disappointed.

We thank you for the chance to "join hands" on this project. We think you're going to be very pleased.

We appreciate your ongoing business and loyalty through the years.

Customers like you keep us in business. We continue to appreciate your loyalty.

You seem like family by now. Your loyalty is so important to us.

Your business is our business. We appreciate the opportunity to meet your needs in whatever way necessary.

You and your staff have been more than customers; you are friends. And we appreciate your business.

Thank You for Buying (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Mitsuka:

As a new account holder at Vitel, we would again like to thank you for giving us the opportunity to serve you.

We want to share with you the features and benefits of our other products and services that might be of interest to you:

- Our CarNet cellular phone system provides service to over 90 percent of Texas, allowing you the freedom to travel that a cellular phone should.
- Our Small Business Connection program gives small businesses discounts on their long distance service—including intrastate, interstate and international calls.
- Our PhoneCare program offers 24-hour service and replacement for all your Vitel products at one annual price.

Vitel appreciates the opportunity to service your new account and is always glad to help a new friend. In addition to the products we offer, we strive to provide friendly, quality service. Remember, we are open seven days a week to serve you.

We look forward to building a great relationship.

Cordially,

Thank You for Buying (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Martin:

We're very excited that you've chosen Capital Vending to meet your vending machine needs. You can count on improved quality, service, and selection.

I want you to know that I personally will be involved with your account and stand ready to answer any questions or concerns you have as you begin your first week with us.

Below are a couple of helpful hints that I thought might make your vending machine a little more useful to your employees:

- In addition to your break room, consider other busy locations for your Capital vending machine. Copy and supply rooms are good spots. If you place your machines in the areas that employees must frequent, your staff will be able to spend less time going to the vending machine and more time on the job.
- Copy the attached survey and circulate it around your office to determine what products should be placed in the machines. Return it to me, and I will see to it that the machines are filled with products that will keep your staff happy.

If you have any questions, feel free to call me anytime (including at home over the holidays [555-8989]).

Sincerely,

Thank You for Buying (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Davidson:

Thank you for the August 9 purchase of office furniture for your new office suite on Oakgrove Lane. We think the popular designs you chose will be both serviceable and attractive even after years of use by your employees. We were also pleased to be able to accommodate your move-in date with our delivery service.

We have appreciated your repeat business through the years as we've watched your firm expand to include various offices around the city. So often businesses fail to get to know their good customers and hear only from those few who are displeased. That's not the case with us. We never want to take your confidence in our furniture and custom design work and your loyalty for granted.

We appreciate your business and plan to keep on meeting your changing needs as you grow. Keep in touch, and we'll try to make your wishes our commands.

Sincerely,

Thank You for Buying (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Howard:

We at Today-Tomorrow Travel want you to know that we appreciate your business and will continue to do all we can to ensure that your company receives personal and professional service from all our staff.

Our personal profiles on each traveler in your company will enable us to give you the fastest service available to meet your individual preferences whatever they might be—from a nonsmoking hotel room to a special-color Lincoln rental car.

We are very proud that you've chosen to give us your business, and we're pleased that you're in Houston.

Thank you.

Thank You for Buying (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Kent:

Welcome to Wilson Printers as a new client. We're pleased that organizations of your caliber have chosen us to work with you on your printing needs.

Enclosed are several brochures introducing you to our hours and services. We hope that you'll let us know of any ideas you have for additional ways we can help you do business—or improve any of our regular services to you.

Drop by and give our staff an opportunity to meet you. We always like to put faces with our account names. Welcome!

Sincerely,

Thank You for Buying (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear New Client:

We want to welcome you to the Alex Jones Equity Fund. We appreciate your investment and plan to work hard to achieve our primary goal of capital growth.

Since the initial offering, we have been committing assets to our new target markets. But we are in no hurry. We plan to assess our selections carefully during the next few months, contemplating a volatile market and desiring success over speed in becoming fully vested.

As a new investor, you will receive our quarterly reports of the fund's portfolio and a summary of the fund's performance by month.

We have every confidence that you will agree that our fund is a real opportunity, and we look forward to serving your investment needs.

Sincerely,

Thank You for Buying (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Vine:

Thanks so much for your initial order of Ergochairs. I'm enclosing your free gift of Jane Tate's *Posture and Productivity* to express our appreciation.

By now you have had a chance to benefit from and enjoy your first order. We look forward to providing you and your staff with additional Ergochairs for years to come.

We are certainly happy to have you join our family of customers and hope you'll find the Ergochair exceeds all your expectations throughout the year.

Sincerely,

Thank You for Buying (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Harper:

Your account has been active a little more than one year now, and we would like to express our appreciation for your prompt payment each month.

Too often, our attention gets focused upon the problem accounts, and we forget to recognize the achievements of those we value most.

We know it is not always easy to maintain an ongoing record of prompt payments. Your account performance, however, is outstanding, and it's good credit customers like you who make our business a pleasure.

Thank you again; we look forward to our next occasion to serve you.

Cordially,

Thank You for Buying (Example 9)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Bob:

Thank you for the opportunity to do business with you this past month. I appreciate your goodwill and want to assure you of every effort to maintain your continued confidence and satisfaction in Infosoft products.

If I can be of service to you in the future or to someone you know, my card is enclosed.

Cordially,

Thank You for Buying (Example 10)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Krueger:

I want to extend to you and your staff once again our appreciation for the time spent evaluating our copy machine. We are very pleased that after a lengthy and detailed study, your decision was to purchase the Repro-Graph 600—a purchase with many benefits:

- You can copy documents quickly and easily, freeing your staff for more productive pursuits.
- High resolution color copies will make all your company documents look like they came straight from the print shop.
- The fast multisheet paper feeder and collator allow you to do even the biggest jobs in-house and inexpensively.

We will be in touch within the next few weeks to help you with delivery details.

Sincerely,

Thank You for Buying (Example 11)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Greene:

Thanks for your deposit on the Execulink phone system. Our telephones have been developed with you in mind and have been enthusiastically received by successful professionals such as yourself throughout the country.

I guarantee you won't be disappointed with the results. But I don't want to keep you any longer, because I know you're eager to use the Execulink and grow a business that will make you some money.

Congratulations! We won't let you down.

Best wishes,

Thank You for Buying (Example 12)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Richardson:

I am so pleased to hear that you have accepted our cafeteria proposal. I have enclosed the signed letters of agreement, along with the revised dates.

We look forward to providing this service to Walcreek Associates and becoming an ongoing business partner, concerned with all your food service needs.

Sincerely,

Thank You for Buying (Example 13)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Wanewright:

Thank you for expressing your confidence in us by arranging to have us conduct our seminars for your team. Here is a book by Jack Ralent that we think should be helpful in determining what other steps you can take to ensure that your staff is sensitive to different cultures. We are very happy to have you with us and hope you will continue to budget our services in the years ahead. Thanks to your support, our rates have remained the same over the past three years, and we hope to continue this trend.

As you know, our seminars will help avert problems with harassment suits, not to mention improve the disposition of your staff! Now that companies are facing increased liability in harassment suits, our cultural awareness seminars should make it much easier to avoid such suits.

Please call us if you have any other needs with employee disposition or company morale. Thanks again for your support.

Sincerely,

Thank You for Buying (Example 14)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Freedman:

Thank you for your order today for ten executive desk pads and matching calendars. We are sending these items out today, and you should receive them early next week.

During our recent conversation, you requested information on other companies who have used our products over the past ten years. Please feel free to contact any of the companies on the attached list. If the individuals listed are not in, someone from the customer service department should be able to provide a candid opinion of our products.

We have also shipped a “loaner” with your trial order. After your delivery, please feel free to keep the “loaner” as our way of saying thank you for using our products.

When you receive your order, please call if you have any questions concerning the correct installation procedures. Thank you again for allowing us the opportunity to do business with you.

Sincerely,

Invitation to Visit Trade Show Booth: Guidelines and Alternate Phrases

- ▶ **Thank the customer for the recent purchase or welcome the organization as a client.**

Thank you for your recent order from us.

We appreciate the confidence you've placed in our organization by opening a new account with us.

Welcome to Hartford Bank. We are so pleased to have the opportunity to provide banking services to you.

Thank you for giving us the opportunity to show you what we can do to service a car properly.

We welcome you as a new client. We've scheduled your first appointment on September 9, as you suggested.

- ▶ **Highlight one or two key benefits of the purchase or the working relationship.**

Our store is open when you're ready to shop, be it early morning or late at night.

Our capable staff has the proper training to deal with the routine and the unusual needs that might arise.

Our convenient locations throughout the area should make it easy for you to take advantage of....

We can provide the necessary security at the lowest possible cost.

Our people are trained to know the appropriate questions to ask and the pitfalls to avoid in assisting customers with their buying decisions.

Remember to use our toll-free 800 number when you have any question at all about service or scheduled maintenance.

Help with support services is just a telephone call away.

- ▶ **Express your expectation for a mutually beneficial partnership and your appreciation for customer loyalty.**

We look forward to working with you for years to come.

We anticipate a mutually beneficial relationship in the marketplace.

We're eager to win your confidence all over again every time you call us for advice and service.

Our two firms have much in common; I'm looking forward to a very profitable working relationship.

We will work very hard to deserve your business.

We will work very hard to deserve the confidence you've placed in our employees who service your account.

You deserve the best, and we aim to give it.

Our aim is to provide the high quality service you deserve.

We appreciate your willingness to let us show you what we can do. We don't intend to disappoint you.

We appreciate the opportunity to provide this service to you. You won't be disappointed.

We thank you for the chance to "join hands" on this project. We think you're going to be very pleased.

We appreciate your ongoing business and loyalty through the years.

Customers like you keep us in business. We continue to appreciate your loyalty.

You seem like family by now. Your loyalty is so important to us.

Your business is our business. We appreciate the opportunity to meet your needs in whatever way necessary.

You and your staff have been more than customers; you are friends. And we appreciate your business.

Invitation to Visit Trade Show Booth (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Helms:

I'm taking this opportunity to invite you to visit Chelsea's exhibit booth 12 at the upcoming cement industry convention, October 12, in St. Louis. We'll be releasing an important new research report that will have quite an impact on the cement industry in the United States.

This report is the first detailed look at cement kilns and nitrous oxides. It also presents some startling results on preheaters and precalciners. You'll see, for example, how selective catalytic reduction systems can be used to reduce NOx. You'll get an inside picture of production of pollutants from the production of portland cement and how these pollutants can be minimized.

We think you'll find a visit to our booth the most valuable time you spend at this year's conference. We hope to meet you there.

Sincerely,

Invitation to Visit Trade Show Booth (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Simmons:

Real Data will be an exhibitor at the Compuspan convention on August 2-4. If you are planning to attend the conference, we hope you will visit us at booth 169 in the Exhibition Hall. We will be happy to talk to you about how our newest relational database can help you:

- Create easy-to-use databases with little development time
- Import information from existing flat-file and relational databases created from most major database engines
- Create useful, independent applications without having to purchase a runtime version of our database

Several members of our staff will be available to explain how we customize our products to ensure their applicability to your data-retrieval problems.

How will you find us? Our booth should attract more than its share of attention. Our 24' X 24' center-aisle booth will be the black-and-gold whirlwind of activity. In fact, you'll see Jim Preston, our company's president, demonstrating our software in person.

We hope you'll visit us during the convention to learn more about our products, publications, and plans to lead our industry into the next decade.

Sincerely,

Follow-Up to Trade Show Booth Visitor: Guidelines and Alternate Phrases

- ▶ **Remind your reader of his or her visit to your booth.**

I hope your visit to our display at the Hotel Convention piqued your interest in our products. Quite frankly, we believe our cold storage units are the best available.

Thank you for a most enjoyable chat at our Comdex booth about your upcoming software decisions. As a distributor to the Fortune 1000, SoftDirect can help you meet the needs we discussed.

Thank you for taking the time to see our laser printer demonstration last week.

- ▶ **Reemphasize the key benefits of your product/service to the customer.**

- ▶ **Describe any brochure or other information you are sending along.**

- ▶ **Suggest the next action step: A phone call or order from the reader. Your plans to phone. A free on-site demonstration.**

Whenever you're ready for another demonstration, give me a call.

I'll be in touch with you in the next few weeks to answer any questions you may have.

Please circulate some of the information I am sending, and then if there's interest from your staff, let me know.

Please let me know what other information you need. May I phone you next week?

If I don't see you at the Pittsburgh conference, I'll phone you again next month to give you a personal demonstration.

Please add us to your list of suppliers. We're eager to get your business.

We look forward to a relationship with your firm.

- ▶ **We're ready to take your order.**

Follow-Up to Trade Show Booth Visitor (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Litnam:

Thank you for the interest you expressed in our financial services at the Entrepreneurs Show held last week in El Paso. We regret only that we didn't have time to be your host long enough to show you our full small business program.

The enclosed materials will give you a graphic insight into the accounting capabilities of our firm. We can ease your financial management burden by providing:

- Complete bookkeeping and accounting services
- Custom 410K plans for your business and employees
- Tax preparation

I'll give you a call next week to see what questions you have after reviewing the Entrepreneurs Show materials.

Sincerely,

Follow-Up to Trade Show Booth Visitor (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Horton:

Thank you for stopping by our booth at the recent retail appliance conference in Cleveland. You heard much at the conference about the “Return of the House Call” theme. We are positioned to help you implement those strategies for growth. The literature you requested is enclosed.

Since 20—, Homesource Repair Inc. has provided quality outsourcing for onsite services to thousands of organizations in the retail appliance industry:

- We guarantee your company on-site service for most major home appliances within 48 hours for any location in the continental United States.
- We handle all the phone calls and all the dispatching.
- We can use your company’s equipment or supply our own.

These are the areas where corporations such as yours can take the competitive lead in the market.

If you’re interested in learning more about our offerings, please telephone us toll free at 1-800-555-6548 and ask for Janet Smithers or Max Stone.

Sincerely,

Follow-Up to Trade Show Booth Visitor (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Goldberg:

I hope you enjoyed the recent virtual reality conference in Los Angeles as much as we at 3-Design Inc. did. Did you see *The Daily Bulletin* article that featured our booth for its original effort to give attendees hands-on opportunity to test our products such as our newest 3-D digitizer and its accompanying software?

The *Bulletin* article explained how only 3-Design has been selected by organizations such as Dreamland and Hybrid Films to solve their digital modeling needs.

We look forward to the opportunity to be your source for 3-D drawing and rendering hardware and software.

Please call 1-800-555-9876 for more information on how we can ensure you quality three-dimensional designs at a reasonable cost.

Sincerely,

Follow-Up to Trade Show Booth Visitor (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Bryant:

The enclosed brochure describes our corner-detail sander that you might have seen in the Raylon Company booth at the March 24 show in Kansas City. Those who visited the booth kept commenting specifically on two new features of the newest model sanders:

- The triangular pad, which moves at 7,500 strokes per minute on the Q7500, and either 6,000 or 17,000 strokes per minutes on the dual speed Q1700+
- The light weight (less than three pounds!)

If you are at all interested in testing any of our products in your own work environment, call Roger Banster at 342-555-9087.

Cordially,

Follow-Up to Trade Show Booth Visitor (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Don:

On behalf of RiteWrite Software, I want to thank you for attending our North Denver office demonstration on Thursday. I hope you picked up some tips on making your own office more productive.

I'll give you a call sometime next month and see if you're free for lunch.

Cordially,

Follow-Up to Trade Show Booth Visitor (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Richards:

We may have met at the Hudson Homeowners convention last month. However, if we did not, I want to introduce you to the BladeRider 320, the industry leader in riding lawnmowers.

Now, I know everybody claims a leadership position, but we have the facts to back up these claims. A recent study published in *Consumers' Digest* quoted 95 percent of our customers voicing their approval of the performance of our lawnmowers and our accompanying service—both top line concerns of ours.

Please keep the attached brochure on file. One day someone will ask you about the availability of a mower such as ours, and you will know just where to find it.

Sincerely,

Follow-Up to Trade Show Booth Visitor (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Dawson:

I hope that your investment of time at the Financial Officers' Association meeting last month was productive for you. Here's an opportunity to make that investment even more valuable to you and your company.

As a follow-up special to the show, we are offering our SpringBooks accounting software at half-price. You can now have the power and flexibility of SpringBooks for only \$___.

Please take a careful look at the literature I've enclosed. I assure you the few minutes it takes will be well spent.

Sincerely,

Follow-Up to Trade Show Booth Visitor (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Lee:

On the chance we didn't speak at the waste management conference in Nashville, I am sending you our catalog. In this catalog are safety equipment and attire of special interest to those of you responsible for outfitting employees to meet OSHA requirements within your organization.

Many companies are taking advantage of TechStyle's years of experience in fire-resistant and chemical-resistant clothing.

If you have any questions on design, availability, pricing, or ordering procedure, please let me know. We also have an excellent discount schedule for quantity purchases (copy enclosed). May we take your order, please?

Sincerely,

Follow-Up to Trade Show Booth Visitor (Example 9)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Engles:

Thank you for stopping by our HeartSpeak booth last month in Providence to ask about our stress relief and executive health seminars. I am enclosing a brochure that details the specific programs you expressed interest in when you completed our convention questionnaire.

As you review the enclosed material, you will find that we have worked with some of the top corporations in the nation. Our programs are tailored for your particular needs and scheduled to fit your time frame. We will be happy to give you specific references so that you can check bottom-line results within some of our client organizations.

We look forward to hearing from you again soon. If I can provide you with additional information about how these programs can address your specific needs, please call me at 1-800-555-8734.

Sincerely,

Follow-Up to Trade Show Booth Visitor (Example 10)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Lutzker:

Thank you for your interest in Metalware products recently demonstrated at the Ironworks Show.

Enclosed is some technical literature that summarizes the physical and mechanical properties of Metalware products. Also included in this information is a summary of our recommended application procedures.

In order to provide the best possible service to our customers, Metalware has established distributorships in various regions of the United States. Chris Roth of Metalware in Chicago (312-555-8678) is the distributor assigned to your region. I encourage you to contact her directly to ask about pricing and availability of our products.

Once again, thank you for your interest. We look forward to your placing an order with us.

Sincerely,

Follow-Up to Trade Show Booth Visitor (Example 11)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Blackstock:

In case you did not stop by our booth at Consumer Electronics Show in Oklahoma City, ElectraLocal wants to offer you a complimentary analysis of your telephone usage patterns. Simply fill out the questionnaire below and return it to us. Upon receipt, we will immediately send you our analysis of your present usage patterns.

We welcome you to join companies like Techtron Inc., VeraciTour, and over 35 other firms of all sizes who have made ElectraLocal their preferred choice for paging systems and other telephone services.

Sincerely,

Welcome to Potential Customers New in the Community: Guidelines and Alternate Phrases

▶ **Welcome the potential customer or client to the community.**

We want to welcome you to the neighborhood.

We're thrilled that you've chosen our city to make your new home.

Welcome to our community. We think you'll agree even after a few weeks that it's a nice place to enjoy life.

We want to extend to you a warm welcome to the work and family communities here in Jonesboro.

Have you settled in yet? Pictures on the wall? Drapes hung? Food in the refrigerator? Well, if not, don't worry. Everything can wait but the food in the refrigerator. We want to make your move and your life a little easier. Here's how:...

Welcome to our city. Your name keeps popping up on newcomer lists everywhere, and we wanted to make sure you knew we were glad to have you in the community.

Do you have a moment for us to welcome you to the area and introduce ourselves?

We hear that you are moving to the community and want to extend our welcome.

Welcome to you and your family as you "migrate" north to Ohio.

We are pleased to learn that you are moving to Nehmann.

We understand that you have accepted a position with Tramart Associates and will be moving to the Wichita area soon. We congratulate you on joining that prestigious firm and welcome you to the city.

- ▶ **Introduce your product or service and highlight one or two key benefits. Avoid making the letter sound like an ordinary direct-mail sales piece: you want to convey a personal interest and welcome.**
- ▶ **Suggest the next step in building a business relationship—perhaps an offer to put the newcomers on your newsletter mailing list, a response card expressing interest in receiving further information, an invitation to attend an informational seminar sponsored by your firm, or a welcome to introduce themselves the next time they're in your store. Mention also any incentive such as a free gift, a discount, or money-off coupons.**

At the risk of adding to your pile of paperwork, we've enclosed complimentary registrations to the next seminar, scheduled for August 6.

We've taken the liberty of enclosing a flier listing the services we have available. May we suggest that you tack it on your refrigerator to keep it handy for your next trip downtown?

Bring this letter with you the next time you come into our store, and we'll be happy to discount your total purchase by 15 percent. How's that for a welcome?

You'll find enclosed a discount coupon worth \$10 off your next purchase.

Let us meet you and welcome you personally the next time you're in our building.

Simply phone us about your intent to open an account here, and we'll write for your family's records.

Drop by to let us know you want to do business with us, and we'll handle all the paperwork necessary for us to go to work for you.

We encourage you to use the enclosed coupon for a 20 percent discount on your initial appliance purchase with us—our way of getting to meet you and introduce you to our excellent products and services.

Drop in for a free makeup and consultation. Simply bring this card with you for a free lipstick pencil—your choice of colors.

Of course, our financial consultants bill on an hourly rate, but we'd like to visit with you for the first hour with no charge—simply acquainting ourselves with your financial objectives. Call Sue Dunnaway at ext. 4560 for an appointment at your convenience.

Welcome to Potential Customers New in the Community (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. and Mrs. Denton:

We want to welcome you to the community. You'll find this a supportive place to raise a family and enjoy life: excellent schools, many places of worship, civic events, educational attractions, and many pleasant folks ready to lend a helping hand in times of emergency.

And while I'm listing the nice things about the community, I don't want to leave us out. By "us," I mean Johnson Kelsey Medical and Diagnostic Center located at 1748 N. Grant at Sanford Drive. Of course, the last thing you want to think about during a move is sickness, but it's nice to know we're here when there's a need.

We have a team of physicians, dentists, psychiatrists, and other medical professionals ready to share their expertise to meet your crises. Our diagnostic and emergency-care facilities make use of the latest technology with their state-of-the-art equipment. And for patients who need extended care, we have comfortable accommodations for them and a family member who might want to stay overnight with their loved one.

Please keep our clinic in mind for your routine medical and dental care. We invite you to stop by our information booth in the lobby (or phone 786-3376) to discuss with the receptionist the specialties of our professional team and the other available services.

We are here to keep you and your family happy and healthy.

Cordially,

Welcome to Potential Customers New in the Community (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Poston:

We have received word that you and your family will be moving to Newell next week. Welcome! We've enclosed a small packet of information—maps, directories of schools, churches, libraries, and important phone numbers—that should help you find your way around.

We also wanted to let you know that our bank is offering excellent real estate loan rates—9-10 percent on conventional mortgages. These rates do continue to change regularly, so we encourage you to call Diane Osborne (234-5777) the next time you come to town and set up an appointment to see how we can help you save some money on your home mortgage.

Again, welcome. We want to make your transition to our community as easy as possible.

Cordially,

Welcome to Potential Customers New in the Community (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Fairbaxter:

I wanted to tell you how pleased we were to have had an opportunity at the Hilman Shrimp Fest to welcome you and your husband to Louisiana. We are glad you could join us in this quarterly “fling” that we host to meet newcomers to the city.

We also want to offer our CPA services to you: complete bookkeeping services for small businesses, tax preparation and related consulting, and financial investment and management counseling. Although we are located in the northwest part of Shreveport, we draw clients from all over the city.

Please stop by at your convenience to talk with me or one of our senior partners about your financial needs. Thanks again for enjoying Louisiana’s finest shrimp with us.

Sincerely,

Welcome to Potential Customers New in the Community (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. and Mrs. Dennison:

On behalf of all of us at Cedar Point Bank, I would like to welcome you to our community. We feel confident that you and your family will enjoy your new home and all the advantages available here in the Cedar Point area.

We would also like to do business with you and your family. By presenting this letter when you come in, your first check order will be free; and when you open a savings account, we will add \$25 to your initial deposit.

Our bank is conveniently located just south of the I59 and Loop 612 intersection, on property adjacent to Newcastle Mall.

Our objective is to provide the finest banking service available in our community. To accomplish this goal, we have the most experienced staff, the finest on-line data processing support, 24-hour automatic teller machines, and the most extensive lobby and drive-in hours available in the city.

Most of our staff live in the local area so someone around here can answer most questions you may have. Just ask for Melinda Garrett, Mark Brighton, or me.

We want to be your bank. We pledge to merit your trust with excellent professional service provided with personal concern.

Sincerely,

PART 2

ROUTINE CUSTOMER TRANSACTIONS

82 READY-TO-USE LETTERS

Responding to Complaints When Admitting Fault: Guidelines and Alternate Phrases

- ▶ **Focus immediately on any positive action you have taken to solve the problem.**

We agree. You are totally correct, and we will pay for the damages to your garage shelves caused by our service personnel. Please forward the repair bills to my attention.

We have now corrected the situation you mentioned in your July 7 letter.

Your letter arrived May 2, and we immediately went to work to correct the missing-authorization situation you detailed.

By the time you receive this response to your concern about the Fuhtii matter, you should have received our replacement shipment of tubing.

As soon as I got off the phone with you, I located Mr. Hytacci to investigate the situation you mentioned. As a result, we have already been able to verify the information you gave us and have corrected the misunderstanding about our clean-up schedule.

Your claim for expenses has been forwarded to me for handling; we have, therefore, enclosed our check for \$478 to cover the cost of the damaged windows.

- ▶ **Acknowledge the complaint even if the corrective action must be delayed and turned over to another person for handling and follow-up.**

We have spoken to our distributor in your area about the urgency of your situation, and he has assured us that he will ship the new order by May 6.

Thank you for notifying us about the difficulty you have had with your storage space. We understand from Mr. Hank Ray that you now have the correct combination to the lock and have immediate access to your stored items.

- ▶ **Indicate an approximate time for resolution if there will be a delay to your corrective response.**

We will schedule the repair service as soon as we receive confirmation of the warranty. We have enclosed an envelope for your convenience.

Mark Hayes will call you on Monday to schedule a convenient delivery time.

- ▶ **Give a brief explanation of how the mistake happened or the situation occurred. An explanation adds credibility to your resolution; at least,**

the reader knows that you have made the effort to investigate the problem. That in itself gives confidence about a resolution. And don't hesitate to give an honest admission of error when that's the case. Such honesty often diffuses the customer's anger more than excuses and vague platitudes about customer service. Similarly, if you have no reason for the problem, a frank admission to that effect usually disarms the reader.

The information I gave you was understandably misleading. I should have been clearer about how the amount was actually calculated.

One of our secretaries inadvertently mislaid the forms in another customer's open file. We regret that error.

We simply did not follow through as we should have with repeated phone calls to make you aware of the possibility of severe weather conditions and possible delays.

Our team leader had an emergency personal situation develop late Thursday and rushed out of the office without remembering to tell anyone of the pending authorization. I'm sorry for the confusion.

We made a mistake, and we ask for your understanding.

You are correct; we did make an error in your last billing. The correct amount should have been \$1489. We can either credit your account or send a refund check. Phone us at 344-9999 to let us know which you prefer.

Unfortunately, in our efforts to get the funds to you faster, we failed to take the time to verify the address against your latest payment coupon mailed to our Shreveport office.

- ▶ **Empathize with the reader about the difficulty or frustration of the situation. Avoid vague generalities; instead, add one or two statements that show the reader that you really understand the specific inconveniences involved.**

I do know that you have had to make four long-distance calls to our headquarters to get the matter corrected. May we reimburse you for these?

Certainly, you must have been disappointed in the delay and the missed deadline for your report.

You probably have been frustrated to no end, trying to find the appropriate person to address this concern!

Of course, this mistake has probably caused you several hours of rework, and I'm sure that increased your distress.

Can we in some way alleviate the burdensome chore of reviewing the employment paperwork that our error caused?

The malfunctioning doors must have created a major traffic jam during your peak customer hours.

I'm sure the two delays created frustration around your office for several days.

- ▶ **Be sure that your tone and comments underscore to your reader that you value his or her goodwill.**

In the event you have a reoccurrence of the problem, please feel free to phone me collect.

Thank you for your patience in dealing with this matter.

Please write me directly in the self-addressed, stamped envelope if I can do anything at all to alleviate the situation.

This service—or lack of it—is certainly not typical of our organization, and I sincerely hope you will give us a future opportunity to show you the true meaning of hospitality.

We will make every effort to ensure that your next transaction with us is handled efficiently and courteously.

We want to assure you that the next time you do business with us, we'll be eager to show you how much your business means to us.

We promise to make your next visit to our store an enjoyable one.

We are concerned that the poster insert created controversy. It was not our aim nor intent to offend any individual's moral viewpoint or sensitivities. Evidently, we unknowingly did so, and we apologize.

- ▶ **Avoid “fight” phrases (such as “you must assume” or “evidently, you were unaware” or “I’m sure you’ll have to agree”) readers don’t like to be told what they know, feel, and must do. These “fight” words will tend to further alienate the reader already caught in a disappointing situation.**

We have received your letter of concern (not *complaint*) about....

Apparently, I was unclear in (not *you misconstrued*) my response to you.

- ▶ **Mention any precautions that you plan to take against a reoccurrence of the situation.**

I plan to keep your number in my tickler file and will check with you periodically for the next few months to see how things are moving along.

I've made a calendar note to follow up with our sales rep again next week about your situation.

Please keep my direct number at hand should you have any further problems.

We have completely discarded the misleading set of procedures and have supplied our service people with the new set of instructions.

- ▶ **Don't remind the reader again at the end of your correspondence about the problem or disappointment. Instead, suggest that the matter has been corrected and that goodwill has been restored.**
- ▶ **Assure the reader that you will *guard* against future mistakes. (Avoid guaranteeing that something will never happen again. Murphy's Law will make you a liar, and then the reader will be doubly disappointed.)**
- ▶ **Finally, apologize with actions, not words. Is there something you can do to ease bad feelings? In other words, can you go the biblical second mile in salvaging the situation, relationship, or project?**

Responding to Complaints When Admitting Fault (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Sherry:

I hope you know that we at TravelExec, Inc. value our relationship and that we want to do everything we can to build upon our experiences for the future. I appreciate your understanding in the recent meeting with our mutual client, Omni Cars, and hope that we'll be given the opportunity to correct any unfavorable impressions.

Do you think it is appropriate for me to contact Jeff Weideman or any of your other staff members to let them know that the inappropriate agenda topics were entirely my idea—not yours?

After looking back on the sequence of events during your recent trip to Chicago, I regret the way things were handled. My lack of planning and sensitivity to the situation put you in an awkward position, and I want to extend my personal apology.

I know that if anyone can turn the situation around, you can. Please let me know if I can help by contacting any of the others involved. Thank you for being alert to the client's perceptions.

Sincerely,

Responding to Complaints When Admitting Fault (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Arnold:

We appreciate your taking the time to fill out our questionnaire and give us your comments regarding your recent experience with product exchanges. Needless to say, I was most distressed to learn of the situation. I am hopeful that you will accept my apologies for the inconvenience and frustration you experienced in trying to return the file cabinets. Such certainly should not have been the case. Normally, we accept returns and exchanges within 45 days of the purchase date, but for some reason on this occasion, the date on your invoice was incorrect.

You may be assured that we have discussed your comments with our staff and have given them guidelines for any future occurrence.

As a token of our apology, we want to offer you a 20 percent discount on your next purchase. Your accepting our offer will give us an opportunity to treat you to the fine service to which you are well entitled and for which we have become known. Please phone Madeleine or me to arrange the details.

Again, thank you for writing and for choosing Office Supplies, Inc. We look forward to welcoming you back as our special customer.

Sincerely,

Responding to Complaints When Admitting Fault (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Hightower:

Many of our long-time customers have called recently to ask where our new catalog is. The catalog is usually mailed with our January statements, but that wasn't the case this year. Let me explain.

The enclosed 256-page, full-color catalog displaying our newest products ran into snags in the printing process and wasn't finished in time for the January mailing. As a result, you now have three weeks fewer to make your selections for this next quarter. Please accept our apologies.

Although we can't give you back those leisurely weeks for decision-making, we can—and will—extend a ten percent discount on anything you order between now and February 21.

We know you'll love the improved layout of the catalog and find exactly what will catch your own customer's eye this spring and summer. I assure you that we'll do everything we can to make 20— your best-ever sales year.

Sincerely,

Responding to Complaints When Admitting Fault (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Jameson:

We have taken the following steps to reduce the possibility of another malfunction in the security gate as occurred on July 12:

1. The gate has been replaced with an entirely new unit.
2. A technician will inspect the equipment every Monday for any signs of damage or wear.
3. Reports from the monitoring equipment will be sent directly to our offices via modem instead of being stored on a local computer.

We apologize for the project delays the malfunction of the security gate caused you, particularly during a period of peak use. Please know that we will strive to keep such situations to a minimum.

Sincerely,

Responding to Complaints Without Admitting Fault: Guidelines and Alternate Phrases

▶ Acknowledge the complaint even if the error is not yours.

Thank you for the January 10 letter about the Fairfield incident. We appreciate the opportunity to respond to your observations.

We have received your letter describing the difficulty you are having with your NRT system.

We've reviewed your letter about how your Finley account has been handled by the Atlanta office.

We appreciate your taking the time to write us about your views on our plans for developing the Grayson property.

Your letter arrived this week just as we have completed our test-marketing on a new irrigation system, similar to the one you have had some experience with at your own location.

We were distressed to learn that you were disappointed with the way in which your equipment was serviced at the Dejon Center.

Heton and Kline Associates welcomes letters such as yours on the experiences customers have while evaluating our training facilities and resources. Such comments give us opportunity to review how and why we do things the way we do.

Thank you for writing us about the situation involving your daughter's delayed registration to the upcoming seminar.

We appreciate your letting us know of your concern with the way your new Buick Regal is performing on short trips within the city.

▶ Explain your perspective on the situation.

Your comments about the possibility of our becoming overextended are well taken. This is definitely very much in our minds, and we're watching that possibility. Our business seems to be reaping the benefits of recovery, and we're grateful for the "problem" while also aware of a possible lag in service.

The loss of the manufacturing system is directly related to the fact that the software does not provide the necessary functions required by your evaluation committee.

We believe that part of the problem stems from the original analysis reported to us....

As a result of our investigation, we could find no cause for the problems you described in your letter.

We do not agree that the misunderstanding developed from a lack of technical expertise on the part of our representatives.

We've investigated the situation, and frankly we can't find the culprit in this incident. We have eliminated several possibilities, however. The ____, ____, and ____ are certainly working properly in all our tests on the system.

Definitely, there are discrepancies in the details recalled by our own service department. Our two technicians on duty still insist that....

- ▶ **Be cautious about admitting fault or liability even if you decide to take some corrective action. Focus on anything you are willing to do to solve the problem.**

While we do not accept responsibility for the problem, we do want to assist you by....

While we regret that our instructions were misunderstood, we are in any event sorry that you were displeased with the outcome.

If our warranty was misrepresented in any way—and we do not understand that it was—we would like to make things right with you by....

We have cautioned our representatives about any promises that we can't adequately warrant in writing. A copy of our warranty is enclosed for your reference if you have further questions.

Although we do not agree that it is our responsibility as a distributor to replace the merchandise, we are making an exception in this case.

Regardless of where the problem originated, we have decided to reimburse you for the damage.

We can write a letter on your behalf to explain to your investors the necessity for this additional verification procedure.

Even though the warranty with this product does not cover the labor charges, we are not billing you for this \$679 amount.

While I appreciate the difficult situation in which your organization must operate, we cannot assume the responsibility of....

- ▶ **Watch unnecessary "fight" words that will tend to sever the relationship completely.**

To be serviced most efficiently, all requests should (not *must*) go through our office.

The postponement in resolution came about after your decision not to proceed (not *heated debate about proceeding*) with the steps we discussed March 3.

We know that you regret the oversight (not *failure*) of renewing your contract as much as we do.

- ▶ **Make the reader feel that his or her goodwill is valued. Try to re-establish a “business as usual” relationship.**

Thank you for taking the time to write us.

We try never to forget that it is loyal customers such as you who keep us in business. We will continue to make every effort to deserve your loyalty.

Thank you for giving us the opportunity to respond to your inquiry.

We appreciate your bringing the matter to our attention so that we could explain our situation to you.

We hope this letter has clarified the issues and that you can understand our desire to keep your business while doing what we think is fair in the situation.

We hope you will reconsider your intention to close your account with us.

Please let us know the next time you're on our grounds, and we will make a special effort to show you the appropriate product lines.

We hope you'll give us another opportunity to serve you.

We fully expect to have improved service upon your return visit.

Thank you for your cooperation during this transition time.

We value your business and want you to know we will do everything in our power to provide the service you deserve.

With your feedback and our concern, our procedures should be much improved. We thank you.

Thank you for your efforts in letting us know of the situation. As a result, the future working relationship between our organizations should be much improved.

A better product at the lowest possible cost is our goal.

Thank you for letting us hear from you. We value your comments and will act accordingly.

When Avoiding Liability While Making Adjustment (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Goldman:

Please proceed with the repairs to the damaged light fixture mentioned in your August 5 letter, and of course, forward the bill to me for payment.

I have talked with Walter Gregory concerning the damage, and he, in turn, has questioned three members of our sales team and our service people about the ceiling damage. None of them seem to have any knowledge of the situation. As we have already discussed, Mr. Gregory has had a commendable record in our organization with no prior damage or loss of service. We apologize that such unfortunate incidents do occur. We will, as always, stand behind our respective services and employees to make whatever adjustment you think is appropriate for their on-site work.

We do hope the damage is repaired to your satisfaction and thank you for giving us the opportunity to show you how much we value your goodwill.

Sincerely,

When Avoiding Liability While Making Adjustment (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Barton:

Enclosed is our check for \$___ representing one half the price to recover your auto so righteously towed by our henchman! Truly honest people do bear the consequences because of others who take unfair advantage in such situations. As posted on our signs, the visitor parking area is free for 30 minutes to everyone, and after that time limit, we have no control.

We are unable to dictate who the towing company is nor their rates for towing. The itemized prices and any imposed fines are within city jurisdiction.

I will assure you that we do not discriminate on towing. Any car found unattended in this "No Parking" area will be towed. Our garage attendants are more lenient, however, because we feel responsible to try to locate the owner before towing.

We apologize for the frustration in having to find another way home that evening and the time and money expended with the towing company. We hope you won't let this unfortunate incident keep you from enjoying the quality merchandise and excellent savings at Northland Mall.

Sincerely,

When Avoiding Liability While Making Adjustment (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Wright:

Thank you for taking time to explain the problems you have had in ordering software from Compusolve Direct.

We apologize for any lack of cooperation and courtesy on our part and appreciate very much the chance to get our products in your organization.

I believe the options listed below offer a solution to the ordering difficulties. When you place an order:

- Ask an employee who is authorized to use your account call us.
- Have your company number available.
- Provide your shipping address (since your company has products shipped to multiple locations).

We have been serving Dorsett Associates with quality computer hardware and software, competitively priced, since 20—, and we are committed to preserving the relationship.

Please let me know if there is anything else that we need to address in order to reestablish Compusolve Direct as your first stop for you computer needs.

Sincerely,

When Avoiding Liability While Making Adjustment (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Davis:

We very much regret the matter you reported concerning the problem with our portable stereo. We are in this instance making an exception to our usual policy and asking our accounting office to send you a check for \$____, which you will receive shortly.

The usual procedure for claims of this sort is for the customer to return the product to the retailer from whom it was purchased for refund or replacement. In case our stereos fail for whatever reason, we do not accept responsibility once the stereo case has been opened by anyone other than an authorized service technician. Of course, we have no control in these situations.

May we take this opportunity also to say thank you for using our products and services—we sincerely appreciate your patronage.

Cordially,

When Avoiding Liability While Refusing Adjustment (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. French:

Ralph Emerson has referred to me your June 6 letter concerning the NRT system maintenance. I have forwarded your comments to the appropriate managers within NRT Inc. At the present time, we see no easy answers to the dilemma. We have, however, investigated alternatives available to you:

1. We will provide you a 5 percent discount on an upgrade to the NRT 2 system, which would be better suited to an operation of your size.
2. You can split your current operations into two 12-hour cycles to reduce the throughput on the NRT backbone.

We understand your concerns, and we are willing to help you implement any of the alternatives outlined above. Please let us know what you decide to do.

Sincerely,

When Avoiding Liability While Refusing Adjustment (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Wu:

Colorview's representatives have completed their review of your video equipment and the distortion problem you mentioned in your March 8 letter. In summary, we have concluded that the difficulty that you are experiencing at your 34 June Street location is primarily being caused by the florescent lights there. Additionally, the consultant review team does not think that the monitors materially affect adjacent monitors.

Other conclusions follow:

1. Your C View 20/450 monitors displayed different distortion in different areas of your office.
2. This distortion was considerably less noticeable when the florescent lights in the office were turned off, though the distortion did not change when the technicians turned adjacent monitors on and off.
3. Your monitors functioned normally in our test labs.

If you can provide us with more concrete evidence of the problem and its cause, please let us hear from you again. I assure you that any additional problems will be addressed in a timely and professional manner.

Sincerely,

When Avoiding Liability While Refusing Adjustment (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Windermann:

We have your August 3 letter about invoices for the equipment delivered to James Windermann.

Mitchel Co. is not responsible, however, for billing statements on this equipment. We suggest that you contact Bob Edison at 213 West Fifth with information as to why you have decided not to make the final payments on XS 345 pneumatic pump. Perhaps they can also give you names of qualified service technicians and consultants who can provide the work you mentioned in your letter.

We do wish you the best in resolving this matter.

Very truly yours,

When Avoiding Liability While Refusing Adjustment (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Hampton:

Your letter concerning Dentaclean products sold by our New Braunsfel store was referred to me because of my responsibility for that product line. Thank you for your candidness.

The products offered by the New Braunsfel store are selected on the basis of their cost and attractiveness to our customers. We periodically review and categorize those products preferred by our customers. The dentifrice you mentioned is a good example of these customer preferences. We sell approximately 300 tubes each month—a good indication that we are in line with our customers' wants.

Mr. Hampton, we hope to continue to select products for their quality and value and hope you will continue to shop with us for that reason. Our ultimate goal is to please our customers.

We appreciate you taking the time to write and give us the opportunity to explain our position.

Sincerely,

When Avoiding Liability While Refusing Adjustment (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Pierce:

We have received your recent letter concerning work performed for you by Medix. Thank you for writing and giving us an opportunity to look into this matter.

Since our area office at 35 Martin Street is directly responsible for marketing in your area, your letter is being forwarded to that office for review. We will give this matter prompt attention, and you may expect to hear from one of our representatives soon.

Joe Dickson, the dealer whose actions are the basis of your complaint, is an independent businessman whose relationship with Medix has been established in compliance with various restrictive federal and state laws and regulations affecting the marketing of first-aid equipment. As a dealer, he is free to hire his own employees, set his own prices, and determine his own operating practices. Claims arising from a dealer's service or pricing practices are solely the responsibility of the dealer.

In the meanwhile, I would like to assure you of our interest and concern. We are always anxious to be informed of situations that could adversely affect good relations with our customers.

Sincerely,

When Avoiding Liability While Refusing Adjustment (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Johnson:

Thank you for your note about your disappointment with the performance of our air screwdriver during your recent construction project. As you may know, this condition may be caused by any number of things, including using the screwdriver on jobs that require more torque than it can deliver and continuing to use the screwdriver after the air compressor has been disconnected.

If you can send us some further evidence to help pinpoint the cause of broken Phillips bit, we will be happy to make some further adjustment in this situation.

Sincerely,

When Avoiding Liability While Refusing Adjustment (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Kozinski:

After our June 4 conversation, I spoke with our Technical Service Department concerning your film processor problem. They, too, agreed that, without having negatives to analyze, it is impossible to determine the cause of the cloudiness of the images.

The temperature of the water in the processor, the quality of the film, and any number of things may cause such problems as you described.

We all understand the frustration of having a processor with a mind of its own. And we hope you understand our reluctance to accept responsibility for poor developing without an opportunity to pinpoint the true cause of the problem.

If the situation recurs, would you please send us samples of negatives and prints for our technicians to analyze?

We do thank you for buying Hertzfeld products.

Sincerely,

When Avoiding Liability While Refusing Adjustment (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Haynes:

We regret the unfortunate incident with the operation of your overhead projector, and we want to outline a plan to perhaps avoid similar difficulties in the future:

- Confirm that your X23 adapter card is seated correctly.
- Before plugging the LCD screen into your computer, make sure that no pins in the adapter are broken or bent.
- Make sure that the drivers for the projector are installed in the PROJ directory.

Screenview Inc. wants to do everything possible to minimize such occurrences, and that's why we provide such detailed installation instructions and operating procedures. I can assure you that I am passing the information about your situation on to the appropriate people so that we can continue investigating such problems and find new ways to emphasize to our customers the importance of following these detailed procedures.

Again, we regret the frustration this situation has caused XTC Consulting's operation and the staff involved. We hope the plan outlined above will prevent any future questions or difficulties in your operating our X23 projector system to your satisfaction.

Sincerely,

When Avoiding Liability While Refusing Adjustment (Example 9)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Redman:

Regarding the concerns you expressed to me about the excessive time required to install our security system, I contacted Ann Davis, our representative in Atlanta, and she followed through with a contact in the southeast area.

Here is what they discovered:

- The default settings on the monitoring software are based on the assumption that the system is using a dedicated phone line.
- There should be at least one motion detector every 1,000 square feet.

If this is the case, then the problems you encountered can be attributed to failure to follow manufacturer's instructions. We regret that there was confusion on the part of your staff in installing the product. Ann will continue to look into the reasons for any similar delays with other customers and will inform you of any further developments or possible preventative measures as safeguards for future installations.

Now that the system is working properly, we hope you will enjoy many safe years with the equipment.

Sincerely,

Submission of Bid, Proposal, or Quote: Guidelines and Alternate Phrases

▶ **Begin with an overview statement of what you are proposing.**

Thank you for the opportunity to quote Bordelon products for use in the Shnook laboratories.

This proposal outlines a comprehensive plan for training all your management and supervisory staff at the headquarters location.

We are pleased to propose to you....

We are submitting our proposal for....

Thank you for allowing us to bid on the linen needs for your hotel chain. We are suggesting an arrangement whereby we would....

We have detailed below the pricing information you requested on the Buggrin furnishings for your field office at Luzanne.

▶ **For a cover letter to a proposal, summarize the key benefits in doing business with your company. If you are selling on price—low price being your key strategy—then highlight that in your cover letter. This overview may be the only part of the proposal that the key decision maker reads.**

We believe that this arrangement will allow you maximum use of your currently installed machines.

We think this decision is a sound one because of the....

Our proposal will allow you to take advantage of your own in-house expertise in the design phase.

We offer low prices, volume discounts, and free delivery.

This system should virtually eliminate your check-back authorization problem.

I don't think you'll find anything currently manufactured that will meet your needs at such a low price.

From our experience with clients in similar situations, we expect you will be able to decrease your processing time by 38-45 percent.

We don't think it's unrealistic at all for you to expect a productivity increase of 20 percent in all four lines.

Improved reliability, lower maintenance cost, and superior quality—all are good reasons to adopt this new way of handling your transactions.

We can promise improved efficiency, clearer work orders, and high-impact visuals.

- ▶ **For a letter proposal, summarize the key benefits in doing business with your company early, going into greater detail later in the body of the letter if necessary. Organize your letter using bullets and headings to assist the reader in skimming the letter for important details.**
- ▶ **Ask for the order, or at least suggest the next action in the buying process.**

May we go to work for you?

May we begin installation?

We're ready to order the materials as soon as you give us the go-ahead.

If you think it appropriate, I will be happy to meet with your committee as they review and discuss this proposal. Perhaps I can help to alleviate their concerns about availability dates.

We are eager to work with you on this project. When may we expect a decision?

Upon receipt of your signed agreement, we will immediately begin the scheduling process.

Simply sign the enclosed agreement page, and we will begin preparing the formal contracts.

I'll phone next week to see where you are in the review process.

As we discussed in your office, we will be more than happy to present the proposal to your managers as a group. I'll phone Friday to talk about that possibility.

- ▶ **Thank the reader for the opportunity to quote prices or prepare a proposal, mentioning any help they provided in supplying information.**

We appreciate your allowing us to quote Canary products for your needs.

Thank you for your help in supplying the data about your operations so necessary to an accurate price quote.

We appreciate the time your staff took in showing us your operations there at Seaside. Their comments were quite informative. As a result, we think we have provided a

comprehensive plan of attack. Thank you for the opportunity to study your situation and the improvements you want to make.

Please pass on my regards to Tim Trimmer, who provided all the model and serial numbers for your equipment. We do appreciate all your efforts in allowing us to quote prices.

We were pleased you included us on your bidders list.

Please keep us in mind for other similar projects, and thank you for allowing us this chance to show you what we can do.

No proposal is completely satisfactory without key customer data such as you were able to provide us. We appreciate your efforts in helping us prepare a quality plan of action.

Thank you for thinking of Westheimer for your cleaning needs.

We hope you'll find this proposal thought-provoking, immediately practical, and cost-effective. Thank you for your part in its preparation.

Submission of Proposal Letter (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Yakamari:

Installation of the new e-mail system will have a major impact on the way Yashika Industries conducts its future business. Purchase of the initial system lays the foundation for future expansion at today's lower cost.

I would like to commend you on the progress you have made with past customized operations. I am proud that our company has protected the investment you made in earlier years by our continued pledge to remain the leader in Internet research.

We would like to propose an integrated on-line communication system installation, with the following specifications:

- Inter-office e-mail for the entire Yashika business campus
- Modem installation for the entire Yashika business campus
- Unlimited Internet access for all employees
- World Wide Web page design
- Training for all systems administrators

As you are aware, the program that allows a 20 percent trade-in discount on older modems is a limited offer. A complete description of the program and the conditions that must be met to qualify for this discount are enclosed. I am pleased that this offering comes at a time when you are already considering improving your Seattle operations; I hope it works to your benefit. As you begin the process to gain the proper board approval, I encourage you to place an order by May 21 to ensure the equipment is in place by your peak summer months.

Thank you for the confidence you have shown in Modemtalk products and services by permitting us to bid on this equipment.

Sincerely,

Submission of Proposal Letter (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mrs. Svenson:

We have designed the following proposal with the understanding of the critical role that fax capabilities play in your business process. The RS 329 Plain-Paper Fax I am proposing is a new model with a life expectancy of 5 years. I am sure that your department managers will find it provides much satisfaction along with a measurable increase in productivity.

Your current thermal fax system is transmitting and receiving documents at a rate of 2 pages per minute. Not only does this speed create substantial long-distance costs, but it jeopardizes your ability to receive important documents in a timely manner.

The RS 329 Plain-Paper Fax receives and transmits at a rate of 25 pages per minute—saving you an estimated \$2500 per quarter.

The actual cost of the equipment is \$____. All terms are outlined on the attached pricing sheet.

Thank you for your courtesy in providing us with the information necessary to propose this RS 329 Plain-Paper Fax to you.

Sincerely,

Submission of Proposal Letter (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Clan:

We are pleased to present our proposal for designing and building your new campus library, all according to the plans and specifications detailed in your June 5 letter.

The Benjamin Franklin Library, although a complex and large project, is actually an ideal level project for our firm. We recognize the importance of this project as a link in the overall process from designing a structure that compliments the existing architecture to engineering a long-lasting and contemporary facility. And we realize the importance of meeting deadlines.

To ensure on-time performance in the most economical manner, this work must be undertaken by a contractor with know-how and experience in this specific kind of project. We believe Bevel, Baines, and Smith can document more such successful experience than any other contractor.

We represent almost 26 years of design/build experience in all parts of the world—the University of Morocco’s physics lab, the San Mateo County Library, and Napa Valley’s Seminary Hall.

Besides our technical staff, other members of the Bevel, Baines, and Smith family, such as Joseph Baines and Sandra Bevel, president and vice president, will make periodic site visits for consultations. These individuals are nationally recognized authorities in their field. We have also attached résumés of the permanent staff who will be made available for this project.

In accordance with the above details and subject to a mutually agreeable contract, we will be pleased to undertake the Benjamin Franklin Library.

We thank you for inviting us to prepare this proposal, and we are available to discuss your questions at any time.

Very truly yours,

Submission of Proposal Letter (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Randall:

Thank you for allowing us the opportunity to bid on the Stellar Project. We are willing to enter into a 5-year contract, but reserve the right to review the pricing structure after 2 years.

We are pleased to submit the following bid quotation:

- | | | |
|--|-------------------------------|--------------|
| • Design/build for 11 DX10 planes | | \$75,000,000 |
| • Design/build-out for interiors: | 7 luxury-load interiors | \$53,001,090 |
| | 4 standard commuter interiors | \$21,003,000 |
| • Maintenance for 5 years of operation | | \$11,202,090 |

Quotation prices are for products delivered in accordance with attached production schedule plus any applicable taxes. All future prices will be those in effect the day of shipment, FOB destination. Our credit terms are 50 percent upon execution of contract and 50 percent upon delivery.

This quotation is open for 90 days from the date of this letter. After that time, we reserve the right to review our pricing structure.

Again, thank you for contacting us about this business opportunity with your company.

Very truly yours,

Submission of Proposal Letter (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Durant:

Thank you for the providing us the opportunity to quote on food and beverage service as part of the Bi-partisan Change for America convention. The scope of this project is impressive and one in which any company would be proud to participate.

This letter certifies that the Foodfair Catering products proposed in our quotation conform fully to the requirements and specifications of your Request for Proposal #BCAC 11.

We are also pleased to quote, as an alternative to your standard banquet supplier mentioned in the RFP, our banquet management services.

Foodfair Catering has been supplying quality products to the international convention and tradeshow industry for over 22 years. You may want to verify our ability to supply a turnkey banquet solution for major corporate functions by reviewing the requirements of the following major projects:

- Inaugural Celebration for Senator George Smith
- 50th Anniversary Convention for Pyramid Sales Co.
- Grand Cayman Sales Splash for ZTM Software

Thank you once again for considering Foodfair Catering for this project. We are eager to hear of your decision and can proceed with the purchase agreements immediately.

Very truly yours,

Transmittals/Cover Letter (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Hightower:

With the data you provided us about the University Bookstore, we recommend installation of our 458 Zeno system. Using this system, you should be able to accomplish the following:

- Reduce inventory by approximately \$125,000
- Improve inventory turnover to an industry level of 3.5
- Cut staff by approximately 50 percent
- Eliminate repeat bad checks
- Reduce customer check-out time

If you prefer to lease this equipment, the cost will be \$2,300 monthly. In about 18 months, the system would pay for itself.

We can schedule your staff for training classes immediately and can assure you that they will be successfully operating the system in a matter of hours.

You also mentioned a delivery date of May 6. Although we ordinarily cannot arrange shipment on such short notice, if that date becomes critical in your decision-making, I assure you that I will do everything possible to meet your deadline.

Full details of all these applications and benefits, along with a cost analysis, are included in our enclosed proposal. Thank you for allowing us to evaluate your needs and for considering our system. We are eager to make you a satisfied user and look forward to doing business with you.

Sincerely,

Transmittals/Cover Letter (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Raji:

HVAC Inc. is pleased to provide you with the enclosed quotation for its climatic control system.

This system, configured for your needs, will provide the following:

- Gas heating
- Centralized temperature control
- Improved Flexon air filters

Delivery, installation, and a six-month, on-site warranty are provided at no charge. A proposed delivery schedule is included for your review.

I look forward to being able to present our capabilities formally to your management. Thank you for your efforts in arranging that meeting and allowing us to make this quote on our system.

Sincerely,

Transmittals/Cover Letter (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Jones:

Thank you for considering Clifford Co. as a possible supplier of forklifts for Grisham Warehouses.

In our meeting, you mentioned several selection criteria on which Grisham will choose a supplier. Let me emphasize why Clifford matches and exceeds every single criteria:

- We have both gas and electric riders available.
- We have included two walkers, in addition to our narrow aisle machines, at no extra price, for your smaller storage facilities.
- We offer free training and maintenance.

We have reviewed all of your technical specifications and have clearly identified in red any major substitutions in our proposal. In case of a small deviation from the specifications, we have noted that deviation. We are confident that our proposed forklifts will meet and exceed your technical, as well as business, requirements.

As a matter of fact, Mr. Jones, a strong partnership already exists between our two companies in other locations throughout the nation. This solid, long-term relationship simply underscores your company's contribution to our reputation as a premier manufacturer.

I'll phone you March 5 to answer any questions you may have.

Sincerely,

Transmittals/Cover Letter (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Hanson:

Thank you for considering InterCAD for your computer-aided design and manufacturing needs. The enclosed quote for the CAD/CAM equipment will detail our technology and value-added maintenance service. The benefits of InterCAD products are three-fold:

- Preconfigured computer systems optimize the productivity of our software.
- Our software can export designs to all major CAD and illustration programs.
- Our custom databases give you the most accurate cost estimate of your design.

InterCAD is offering the most efficient, cost-effective programs and delivery system available in the industrial marketplace.

We are looking forward to reestablishing InterCAD as your partner in developing your future product lines.

Sincerely,

Transmittals/Cover Letter (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Schneider:

We take pleasure in presenting our proposal for the management of Portland Computing's customer support services. VoiceCom offers professional customer relations and support service with the highest technical standards, strong management, and a dedicated, well-qualified staff.

Our recommended approach is:

- A staff of 15 dedicated to Portland Computing's customer support
- Two managers who will oversee the staff, as well as handle calls as needed
- A Portland X35 computer at every staff member's desk to help with troubleshooting

To lower costs, we will use our existing system for logging calls and recording issues. We project savings of at least \$___ over the three-year term of the contract.

I look forward to reviewing our proposal with you and promise to keep Portland's customer support service at "showpiece" standards. We want to use your facilities to show off our skills to other potential customers in the area. Thank you for the opportunity to offer this proposal.

Sincerely,

Transmittals/Cover Letter (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Richard:

Enclosed are three lease agreements to be signed, initialed, and returned to me.

The lease term is for three years, with an option to cancel in six months. With the three-year term, we were able to reduce the monthly payment to \$____, instead of the price initially quoted. A copy of the rental calculation is enclosed.

When we receive your check for \$____, we will return a copy of the agreement for your records.

We look forward to helping your business grow with ours.

Sincerely,

Transmittals/Cover Letter (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Rutherford:

As you requested, we are enclosing a proposal to provide soil sampling services for the Cape Hudson site. We very much appreciate the opportunity to provide such services for Quick Star.

Our proposal includes a rate schedule by classification for our staff members who might participate. We have also presented a list of available services for your review and decision.

From estimated work-hour requirements, we arrived at a not-to-exceed figure of \$___ in the proposal. The complete project objectives will be met, and the billing will not exceed this guaranteed amount. Determined by the actual work-hour requirements, the actual fee could possibly be less.

We propose a monthly billing based upon the number of hours worked on the project in a calendar month by various staff members and the appropriate rate from the enclosed schedule.

Please let us know if you have questions. Our staff is looking forward to working with you to verify the environmental safety of the site.

Yours very truly,

Transmittals/Cover Letter (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Lucas:

Enclosed you will find our proposal for installing the cash registers at your north store. The turnkey price is \$____, plus local tax. We guarantee that these machines will decrease the time for the average check-out by 25 percent, or we will provide additional registers to make up the difference at no charge. The attached charts show the productivity gains from faster throughput, more accurate entries, and fewer keystrokes. The projected payback is ten months' use.

We think you'll immediately agree that these new registers will improve your operations in three ways:

- Quicker check-outs
- Faster employee set-up
- Improved inventory control

As you requested, we can complete installation before the end of April. In fact, we promise installation within two weeks of your go-ahead.

I personally will supervise the work to ensure code requirements and high-quality standards. Do we have your authorization to begin?

Sincerely,

Transmittals/Cover Letter (Example 9)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Gerry:

Based upon our joint study of your business needs, we are pleased to propose a subscription to two of our monthly CD-ROMs, the *Federal Registry* and *Heavy Industry Regulations*.

As stated on several occasions, Gerry, the success of your business is directly related to your management decisions—decisions that require immediate availability of current and impending laws and regulations. And that’s where we enter the scene.

Your specific decision on our CD-ROM service will allow you immediately to:

- Anticipate upcoming industry trends
- Focus your lobbying efforts where they will do the most good
- Evaluate your company’s compliance with existing and proposed regulations

With your approval, we are prepared to begin your subscription immediately.

Sincerely,

Amendment of Bid, Proposal, or Quote: Guidelines and Alternate Phrases

- ▶ **Identify the bid or proposal you want to amend immediately. Mention the project for which you are bidding, the date you submitted the original bid, or any other information that will distinguish your bid for the reader.**

Thank you for allowing us to revise our quote on using Bordelon products in the Shnook laboratories.

This letter contains modifications to our proposal for training all your management and supervisory staff at the headquarters location.

We have detailed below our updated pricing information on the Buggrin furnishings for your field office at Luzanne.

- ▶ **Detail the changes to the original bid or proposal. If the changes are extensive, use headings or bulleted lists to help the reader get an overview of the amendments quickly.**
- ▶ **Provide an explanation for the changes. Stress any benefits your potential customer will gain from the new arrangements.**

We think this decision is a sound one because of the....

Our proposal will allow you to take advantage of your own in-house expertise in the design phase.

This new system should virtually eliminate your check-back authorization problem.

Improved reliability, lower maintenance cost, and superior quality—all are good reasons to adopt this new way of handling your transactions.

With this new system, we can promise improved efficiency, clearer work orders, and high-impact visuals.

- ▶ **Thank the reader again for the opportunity to quote prices or prepare a proposal.**

We appreciate your time in considering these revisions.

Thank you again for including us on your bidders list.

- ▶ **Provide a signature line for the reader if this letter acts as a binding addendum to an accepted proposal or if acknowledgment of receipt of the amendment is necessary.**

Amendment of Bid, Proposal, or Quote (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Bates:

This letter is to serve as an addendum to the original agreement dated March 4, 1995, between ToolWorks and the University of Jackson. We will provide drill presses, grinders, and saws, as well as the supervision and training to ensure quality maintenance services. The guaranteed productive and nonproductive hours of the physical plant employees will surpass all current standards with this program.

Our current annual contract price for such services will be \$___, payable monthly upon invoicing.

Would you please acknowledge acceptance of this addendum by signing both copies of this letter and returning one copy for our files.

Respectfully submitted,

The University of Jackson accepts the above contractual changes and billing terms in consideration of maintenance and construction services provided by ToolWorks.

Jim Bates
University of Jackson

Amendment of Bid, Proposal, or Quote (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Gilmore:

Thank you for this opportunity to update the floor tile proposal presented to you several weeks ago.

We have made some modifications.

First, we recommend using adobe instead of slate. We have tested our adobe tile under conditions similar to the ones you mentioned and have found it to perform satisfactorily. The use of adobe will allow us to reduce our estimate from \$___ to \$___.

Second, we propose laminating the tiling. Although lamination will add to the installation cost, it will give longer life to your floor. The added durability is doubly important in the high-traffic areas of your building.

While the lamination will cost \$___, we are reducing our bid from \$___ to \$___.

Please note that all terms and conditions of the earlier proposal also apply to these pages.

We appreciate your continued consideration of our services for your tiling needs.

Sincerely,

Amendment of Bid, Proposal, or Quote (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Chan:

Since we submitted our proposal dated June 4, 20–, to provide Nusoto Inc. with surveillance systems for its two West Coast locations, a new camera, model #R42, has been introduced. Not only does this new model have an improved zoom lens, it is less expensive than the one we originally proposed for you.

Specifically, the additional benefits to you of model #R42 are:

- Zoom up to 350 percent
- Time and date stamp
- Clear picture at as low as .5 foot-candles of light

Delivery and installation schedules, payment terms, and all other conditions of the original proposal still apply.

Please let me know if this substitution raises questions for you. If not, please sign below authorizing this change and return a copy of this letter to me for our files.

I look forward to hearing your decision soon.

Sincerely,

(Signature line for buyer)

“No Bid” Letter: Guidelines and Alternate Phrases

- ▶ **Thank the reader for his or her interest in doing business with you.**

We appreciate your offering a chance to bid on....

Thank you for the confidence you’ve shown in our firm by asking us to prepare a bid on....

- ▶ **Explain tactfully why you are declining to make a bid.**

Major factors in our decision in this case are time and short deadlines. We simply cannot....

We are concerned that we will have difficulties in....

- ▶ **Express appreciation for the contact. Mention if you are interested in preparing bids in the future with the reader.**

Thank you for writing us.

We hope we will be able to work with you in the future.

Please consider us again for future projects.

“No Bid” Letter (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Fritz:

Thank you for allowing us the opportunity to bid on the warehouse build-out for your San Mateo headquarters. We are declining to bid at this time, however, because we no longer stock the items you have requested.

As you may know, we now do only custom cabinetry work. If you have not yet made the final decision to purchase these stock items, we would like to talk with you further (and furnish quotations) about our custom cabinets.

In any case, please keep us on your bidder’s list for any future needs.

Very truly yours,

“No Bid” Letter (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Joseph:

Thank you for allowing us the opportunity to bid on your food service requirements for Harriot Industries. We are not, however, submitting a bid at this time because we cannot meet your delivery schedules. At present, we are unable to supply product to the East Coast regions.

We want to remain on your bid list and, perhaps on future quotations, to bid by product within those zones where we can supply. Thank you for your interest in our quality products.

Very truly yours,

“No Bid” Letter (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Hedgeling:

Thank you for requesting our bid on Excalibur conveyor belt riggings. We regret that in evaluating the bid we find that we cannot meet your discount schedules. Unfortunately, at this time, we must offer a “No Bid.”

Would you please keep us on your bid list for future needs?

Sincerely,

“No Bid” Letter (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Hankins:

After carefully reviewing the AFS’s program milestones and our previous commitments, we have decided not to submit a proposal to assist you with your telemarketing program.

The opportunity to assist with phone-based marketing and sales would be both challenging and interesting. Unfortunately, the key professionals most qualified for managing these program activities are obligated on other projects during the time frames that are necessary for this effort. We simply will not attempt a project of this magnitude if we cannot give it our best efforts, using our most qualified individuals.

Thank you for considering us. We look forward to working with you possibly on some future project. You seem to be following a well-thought-out approach, and we wish you success with your efforts.

Sincerely,

Cancellation of Product Line: Guidelines and Alternate Phrases

- ▶ **Thank the reader for doing business with you or expressing interest in your company.**

Thank you for contacting us about the research work you have underway.

We appreciate your writing us about the products you saw advertised recently.

We've heard a great deal about your organization and are flattered that you would think of contacting us about....

Your information arrived today; thank you for considering our products and services in your marketing and distribution plans.

- ▶ **Tell the reader about cancellation of the product or service, outlining your reasons for the decision.**

This cancellation is due to the incorporation of this service into our new three-year warranty.

We canceled the P315 amplifier in favor of our new P625 amplifier which has a wider array of features and is priced 20 percent lower because of improved manufacturing techniques.

We regret that we are unable to continue to offer our De-Contam services in Kansas due to the recent passage of House Bill #4557 by your state legislature.

The extreme difficulty in obtaining the natural raw herbs and other materials in sufficient quantity and quality to meet our standards has necessitated the cancellation of the Easybreathe inhaler.

- ▶ **Suggest any possible alternative for the product or service your company offers, or offer a referral to another company, if possible.**

I am enclosing information on our new Fleetright line. I'm sure you'll find Fleetright just as durable and well made as the Silverstreak.

We are pleased to offer you a 15 percent discount on our Deluxe model which offers more features for only \$___ more than the Standard model.

I understand that the Thompson Company in Madisonville plans to introduce a similar repair and maintenance service and would welcome your inquiry.

Cancellation of Product Line

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Westmeister:

Thank you for your April 15 letter asking about our stationary bikes. However, we have recently decided to discontinue our HealthCycle line. We found that popularity of our HealthStep line demands that we dedicate more resources to that product. You may want to write the Spin Bike company for information on similar products available.

Thank you for your interest in HealthGear products. If we can help you in any other way down the road, write or phone us again.

Sincerely,

Introduction of New Sales Representative: Guidelines and Alternate Phrases

- ▶ **Explain that a new salesperson is taking over the account and compliment the former one.**

We regret to say that Carrie Jones has transferred to our Midwest Division, but are very eager to have you meet Sam Wade, her replacement. As you know, Carrie had the energy and enthusiasm to meet every obstacle in servicing your needs. We think Sam is her match.

Bill Cummings was chosen to head our new South American division and David Lehmann will replace him as head of the Western region. We know you and Bill produced many successful projects in the last few years and we believe David will continue that record. He comes to our region with the best on-time, in-budget record in our company.

We are sorry to announce that Bob Walsh will retire next month. Even though Bob's reputation and experience are unequaled, Chris Moore is his hand-picked successor. As you know, Chris has been working with Bob for over a year and is very well prepared to assume management of your account.

- ▶ **Give the new representative's qualifications (education, experience, or personality) for handling the business.**

John has a Doctorate in Environmental Science from the Colorado School of Mines and more than ten years of experience working in the industry. We are confident that you will be well served by this addition to the Clean America staff.

Susan was the Number One producer for West Coast Re-Insurance for the last five years. She brings a new level of expertise to our agency and we know you will also benefit from her experience.

Kirk has never lost an account at JB Advertising due to his constant vigilance and personal attention to all the small details that make an advertising campaign successful. We feel sure you will appreciate his pursuit of total client satisfaction.

- ▶ **Express confidence that the good relationship will continue.**

We know you'll give John the same warm welcome you always extended to Frank Towers.

We've assigned one of our finest reps to handle your special needs because your business is so very important to us. We look forward to continuing to meet your needs.

We know that you will miss Peter just as we will. We are confident that George will continue to provide the efficient, effective service that you are accustomed to from Law Research Services.

Helen and the rest of our staff join me in pledging to you our goal of servicing your account to your absolute satisfaction during this transition and for years to come.

Introduction of New Sales Rep (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Abney:

Your former service rep, Donald Payne, has accepted a management position with our organization, and First Data Services has asked me to serve as your new agent. This change will not affect your maintenance program in any way or change the status of any project you now have with us.

I am anxious to meet you and plan to stop by your office as soon as I learn my way around the area. I have learned the data processing business well in my five years' tenure—it's geography that has me stumped at this point. Seriously, I'm eager to learn specifically and firsthand just how we can improve our service to you at Walsh Geophysical.

Meanwhile, should you have any questions or needs, please call me at 214-348-9787, and I'll be in touch immediately.

Sincerely,

Introduction of New Sales Rep (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Thomas:

Effective February 1, Bob Hutchins will become our ETG sales representative for commercial accounts in Preston County. As you may have heard, Glenda Rapon has moved into our public relations office. I know you two enjoyed working together because she has spoken so fondly of servicing your account over the last two years. But I'm sure you'll agree that with her winning personality and excellent communication skills, our PR department is exactly the place for her.

We think you'll equally enjoy getting to know Bob and working with him on your investment needs. He has a graduate degree from Purdue and six years' experience in our Shreveport branch in handling accounts with the same interests and investment strategies as yours. In fact, we're getting calls from his Shreveport clients who are chagrined because of his decision to move to our area! Nevertheless, that's our problem.

Bob will be calling you in a few weeks to arrange a convenient time to meet with you. He's eager to get thoroughly acquainted with the ways we can serve you best.

Cordially,

Introduction of New Sales Rep (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Brenda:

I realize that you have been using other equipment for your desktop computing needs, but I wanted to let you know that Pro Computing can now offer laser printers and fax modems.

Our local branch office in Sugarland has many office products and resources to offer you, including the See Better Monitors. We are very involved in the Atlas project with some of your other divisions and would welcome the opportunity to discuss with you some of the things they are doing at these locations.

As your local Pro Computing representative, I would like to introduce myself and my company to you personally. I'll call you on Tuesday, August 10, to set up a convenient time to get acquainted. If you prefer to contact me, I can be reached at 713-456-5555. I look forward to our meeting.

Cordially,

Introduction of New Sales Rep (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Tucker:

Let me introduce myself: I'm Suzanne Varnell, the new manager of your local Pro-Interior store. Although I've been managing office decoration stores for over sixteen years, customers **can** teach old managers new tricks! Therefore, I hope soon to have the opportunity to get to know you personally to find out how our store can meet your personal needs and those of the community.

Our primary objective is to provide you with a myriad of options in a stimulating atmosphere where making a wall covering, paint, or carpet selection is fun. I personally pledge that we will do our best to reach this objective.

Let me remind you about our current special quantity prices on Berber carpets. I'm very excited about helping you select all your finish choices. We want you to have the finest selection available.

Will you call, write, or visit us soon? I speak for the entire store staff when I say that we welcome the opportunity to serve you and the business community. We look forward to continuing that service for many years to come!

Sincerely,

Introduction of New Sales Rep (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Richardson:

I have recently accepted responsibility for your account in the Shreveport office. May I have an opportunity to meet with you to learn more about your organization and let you know what resources are available to you from Guardian Insurance?

Also, I have a little gift you may find useful.

I want you— as a long-standing customer of Guardian— to know how much we appreciate your business relationship. I will be calling you on April 15 to arrange a convenient time to talk further.

Sincerely,

Introduction of New Sales Rep (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Rice:

Allow me to introduce myself as your new Reliance Industries sales rep. I understand that Rice Motors and Reliance have had a long-standing partnership, and it is my intention to continue that relationship.

Several managers within your organization have agreed to meet with me during the next few weeks so that I can learn more about your operations and discuss other possible ways we may be able to assist you in accomplishing your goals. I'll plan to phone you within the next few weeks to see when it might be convenient for us to talk further about your specific departmental needs.

I look forward to working with you.

Sincerely,

Introduction of New Sales Rep (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Duke:

My name is Frank Maupin, your new USA Cellular rep at Yorktown. With seven years in the business, I hope to put some special experience and expertise to work for you. Likewise, I'll appreciate your willingness to share with me your knowledge base and specific needs at Duke Real Estate.

As you may know, we are open 24 hours a day to accommodate your needs for convenient, quick, quality service. We employ certified technicians with the most up-to-date equipment, and our staff will offer you free written estimates.

We are committed to handle your concerns in an efficient manner. Please come by and meet all of our outstanding team.

Yours in service,

Introduction of New Sales Rep (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear David:

Effective October 1, I will assume responsibility for servicing your dealership. I have been with Major Electric for eight years covering outlets in the mid-Atlantic area. We have experienced tremendous growth in the past few years and as a result, have realigned our group to improve support of the dealers in our area. My focus will be all outlets in the Baltimore area.

My personal goal is to improve Major product sales through your store by at least 15 percent in the coming year. I can help you with:

- Special requests/issues not covered or answered by other sources
- Joint sales calls to your key customers
- Assistance with trade shows and seminars
- Product training and program or policy explanations

We both want to be successful, and it's my intention to assist you in these and other ways you may think of. So that we may work smarter together, I suggest the following resources to get immediate answers for your day-to-day questions:

- Our full-color catalog
- Our toll-free answer line
- Our line of product-specific video tapes
- Our on-line database of commonly asked questions

We consider your business valuable and thank you for your interest and support. I look forward to developing an even stronger relationship in the near future.

Respectfully,

New Service or Change in Service: Guidelines and Alternate Phrases

- ▶ **Announce the change in service immediately, including effective dates.**
- ▶ **Use a positive, upbeat tone (rather than a scolding tone) that makes readers feel as though the change is to their benefit or at least to the benefit of the customers as a whole.**
- ▶ **Giving adequate explanations goes a long way in helping customers accept changes. State the all the information relevant to the change in service—such as rates, representatives, procedures or locations—along with any explanation you think will make the changes understandable or acceptable.**
- ▶ **If you are writing to confirm a change in service requested by your customer, restate all the important facts and details you want to verify. (Provide a signature line for the reader if this letter acts as a binding addendum to an existing contract or if acknowledgment of receipt of the letter is necessary.)**
- ▶ **Thank the reader for doing business with you.**

We invite you to stop in from time to time and chat with one of our senior executives to let him or her know of any new needs you have in the field. Who knows? Together, we may just come up with a new product that will change the way we all do business.

Thank you for the privilege of providing this service to you.

Thank you for coming to us with all your ___ product needs.

We will never take your business for granted. That's why we are continuing to improve our service to you.

We pledge to you that we will continue to improve our service in all the ways that count for you.

New Service or Change in Service (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Gabrielle:

We're proud to announce that we've expanded our insurance services again to include life insurance and dental insurance.

We also welcome three new staff members—Martin Singleton, Paul Cuellar, and Chris Seagon—to help you with your company's claims. I hope you will enjoy our new arrangements and "personalities." They're committed to making your life easier by working with your human resources department to find the benefits package that is best for your employees and your company.

Thank you for your business.

Sincerely,

New Service or Change in Service (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Ellis:

I want to confirm our mutual understanding that you do not intend to place your new Equator model T586 on a maintenance agreement. Because that is the case, upon termination of the 90-day warranty period, Zelcomp will provide maintenance on an hourly-and-materials rate.

Should you decide, after the warranty ends, to place this equipment on a maintenance agreement, we must inspect it prior to qualification. After the 90-day warranty period, you may contact Janet Wilson to make changes in the maintenance agreement.

If this is your understanding of our agreement, please sign this letter below and return a copy for our files.

Thank you for your purchase. We hope you benefit from its performance for years to come.

Sincerely,

New Service or Change in Service (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Hardin:

Beginning June 15, when you use our food supplement service, you'll mail all of your payments to Portland instead of Seattle.

Focus on Fitness has opened a new state-of-the-art center in Portland to serve your needs better. We will continue to provide you with up to a 90-day supply of Vitaforce for only \$____.

Enclosed are pre-addressed envelopes with our new location, along with a brochure describing the new program. If you're using the service for the first time, be sure to complete the form attached to the brochure and send it with your first order.

We encourage you to take advantage of our dietary supplement and management service. It's an easy, low-cost way to:

- Lose weight
- Look great
- Feel fit

With any questions about the program, call our service hotline at 1-800-555-9090.

Sincerely,

Rate Increase or Policy Change: Guidelines and Alternate Phrases

- ▶ **If you are writing in response to an order, be sure to thank your readers for their interest.**

We appreciate your confidence in once again ordering from us.

Thank you for giving us another opportunity to serve you. We have received your response card and order for 250 customized, gold-stamped binders.

We have received your re-order and very much appreciate your continued business.

Today's mail brought your purchase order requesting a new supply of dacron sheeting for your umbrella canopies. We are pleased at your continued support of our ultra-light fabrics. Thank you.

- ▶ **Give the details of the rate increase or policy change. Use a positive, upbeat tone (rather than a scolding tone) that makes readers feel as though the change is to their benefit or at least to the benefit of customers as a whole. Giving adequate explanations goes a long way in helping customers accept changes.**

We want to explain one new policy with regard to....

We have a new policy to enable us to better serve you....

There has been one change in policy since you last ordered from us....

As you may recall, we haven't had a price increase in the last four years. However, our increased production costs have now made it necessary to raise prices on our fans. The model you ordered is now \$456.

While some of you have enjoyed the convenience of...., we think the added value of.... will more than compensate for the extra time required to....

We promise you help every step of the way. And we can assure you that this new policy will add value to your membership in the years to come.

Recent legislation affecting the workplace has forced us to make some physical changes in our plant. I'm sure you have also experienced this requirement and understand our position.

Even though we will no longer provide free shipping, we have negotiated a firm three-year contract with very reasonable rates due to our ever increasing order volume.

▶ **Reemphasize key benefits of your product or service.**

We want to remind you that this is our first price increase in five years even though we have added many performance features during that period.

Our last update of your software was provided at no charge to express our appreciation of your support of Best Officeware.

We will continue to offer the best product at the lowest price. Our field research tells us that you and our other customers value our commitment to that goal.

We assure you that our Research & Development group actively pursues improvement in speed and efficiency at the same or lower cost. This focus has enabled us to offer a number of upgrades in the past for nominal prices. We appreciate your use of our equipment and value the relationship that has developed over the years.

▶ **Assume the customer will continue to do business with you.**

Thank you for the order, and as soon as we hear from you with further details, we'll be glad to fill it.

Let us know that you agree to these terms, and we will process your order immediately.

We are ready to ship your merchandise immediately—just let us know your preference on the new discount arrangements.

Thank you for doing business with us.

We look forward to working with you on this project.

Rate Increase or Policy Change (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear George:

Within the next few days you will be receiving official notice of a price increase on most manufactured structural products being purchased by The Barnes Company. That notification will come directly from our home office; however, I wanted to provide you as much advance notice as possible and explain why we've found it necessary to adjust our prices by eight percent.

To put this increase in perspective, it is helpful for you to know that we have received similar or greater price increases from almost every supplier. Our raw material price increases have varied from a low of three percent to a high of 32 percent. Additionally, our labor costs over the past three years have increased by an astounding 21 percent.

We have continued to maintain our present quality:

- We custom build trusses and beams of all types to your exact specifications.
- We deliver your order within 72 hours.
- We guarantee your complete satisfaction.

So you can see for yourself the necessity of this price adjustment. We appreciate your ongoing confidence that we are working to keep prices as low as possible while offering the highest quality.

Sincerely,

Rate Increase or Policy Change (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Walters:

We have received your order for a subscription to *Golf Week* magazine. We appreciate your order, but there is one problem—in January our rates increased. A one-year subscription is now \$46.

Therefore, I'm returning your check #3445 for \$32, along with a current subscription form and return envelope.

We hope these terms are satisfactory to you, and we look forward to having you as a regular reader. As soon as you can send us another check (or let us know to bill you), we will begin your subscription and get your first issue in the mail.

Thank you.

Sincerely,

Rate Increase or Policy Change (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ken:

The warehouse staff tells me that they have been providing boxes to your company for use in your packing facilities. We have been providing these boxes at no charge for as long as anyone can remember. To our surprise, however, we've discovered that this usage is equal to a pallet per week, or approximately 52 pallets per year.

At the end of this month, we will no longer be able to provide these boxes free of charge. However, we do propose to provide them to you in the same volume and invoice you every quarter. At today's rate, the total for the first quarter will be approximately \$___.

Please let me know how you want us to handle this.

Sincerely,

Rate Increase or Policy Change (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Faust:

The accounting procedures on your Check First checking account processed at Texas Interstate One locations have been changed to more accurately reflect those used in our other branches. This change will enhance our reporting capabilities, improve our document formats, and clarify our purchaser allocation statements.

These improvements will offer both accuracy and consistency among all your statements and will also provide more information on your ATM and Visa debit card purchases.

A brief explanation of each change is detailed below:

- The start and finish dates for each statement will conform to the beginning and ending of each calendar month.
- Statements will have separate registers for ATM withdrawals, Visa debit card purchases, check purchases, and deposits.
- ATM withdrawals and Visa debit card purchases will be entered into your account on the next business day.

If you have a specific need for more specialized information, we may be able to create such a report. My phone number is 214-555-7676.

Sincerely,

Rate Increase or Policy Change (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Tom:

We are enclosing a copy of our contract. Because there have been many changes over the years, I have reissued the document for your review. One recent change is my hourly rate increase of \$25.

As you have time, please leaf through the contract and note any concerns you have. You can reach me at 245-333-7600 with any questions. (There's no need to return the contract copy.)

Sincerely,

Rate Increase or Policy Change (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Jackson:

We have received your request for reservations during the ARWA convention and are looking forward to the pleasure of welcoming you personally to the Beachfront Hotel.

For each reservation that we accept, **we are now requiring a first and last night's prepayment.** The first night's prepayment will serve to guarantee that your accommodations will be available on the check-in date; the last night's prepayment will guarantee your accommodations through your departure date.

Many hotels in the city, along with ours, are experiencing very high cancellation rates and no-shows on conventions that have asked us to set aside blocks of rooms. Additionally, inaccurate arrival and departure dates have caused many of our loyal guests to be inconvenienced.

In order for the Beachfront Hotel to continue to provide the excellent service for which we've become noted, we have established this new reservation policy to minimize any such inconveniences to you.

When you receive our confirmation, please review the accuracy of your arrival and departure dates and then forward your check to the Reservations Manager.

We are confident that this policy will allow us to serve all our guests in a more efficient manner and that we will be able to honor your reservation to make your stay with us trouble free. Thank you for choosing to be our guest May 6-10.

Cordially,

Rate Increase or Policy Change (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Dockerty:

I'm writing in regard to the automatic lease payments deposited directly to Commercial Bays' bank account.

We are unable to accept your offer of direct deposit because our present method of accounting does not efficiently handle this method of payment.

We've enclosed a copy of our agreement, showing procedures for lease payments and other miscellaneous invoices. Call me at 214-555-9999 if I can clarify further any of these changes.

Sincerely,

Rate Increase or Policy Change (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Cummings:

Increases in raw materials, freight, and labor costs have forced us to announce a price increase to be effective July 1.

Concurrent with the price increase, Douglas Industries has elected to improve our packaging to include UCC codes for scanning efficiency. Accordingly, distributor prices of products shipped from our packaging plants in Birmingham will increase as specified on the attached new price sheets.

But we do have a bit of good news. We will guarantee shipment at the old prices on all orders placed for immediate shipment received by August 1.

When you purchase Douglas products, you're getting the best the industry has to offer. These products are unrivaled when it comes to innovation, creativity, and dependability. We know you'll be especially pleased by the new array of contemporary ads and promotions we have in store for next year. Each program is designed to help you move merchandise and increase your own profits.

Sincerely,

Rate Increase or Policy Change (Example 9)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Don:

Thank you for your August 9 printing order for the manuals, letterhead and envelopes, business cards, and mailing labels. Congratulations—it looks as though your business is continuing to grow.

We noticed on your order that you also asked to have all printing plates and veloxes for the manuals returned to you, as usual. However, about three months ago, we initiated a new policy that the plates cannot leave our offices after a completed job. As you may be aware, we do price our work so competitively that sometimes we have to depend on repeat business to make a profit on particular jobs. Therefore, our decision to keep all plates is our effort to encourage reprinting jobs here and to build loyalty from our customers so that we can continue to give them the lowest prices.

Since you've been doing business with us for so many years, we hope this new arrangement won't cause any inconvenience to you. Unless we hear from you otherwise, we will be processing your order and completing your work in the customary, speedy fashion.

Thank you for giving us another chance to meet your printing and stationery needs.

Sincerely,

Rate Increase or Policy Change (Example 10)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Bell:

Over the past few years, Congress has enacted legislation—specifically The ADA Act of 1990—which has increased our costs in producing the Zephyr .

To meet the increased costs associated with these new regulations, we have found it necessary to adjust certain prices. Effective for 20–, the start-up cost for the Zephyr annual maintenance contract will be increased to \$100.

There continues to be no charge for pick-up or redelivery.

We are grateful for the opportunity to do business with you and are committed to providing you with the highest quality service possible.

Sincerely,

Rate Increase or Policy Change (Example 11)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Webster:

As you know, pricing increases are a necessary fact of life in the day-to-day operation of any business. We realize this and hope you are aware that increased costs in excess of 12 percent within the last year for recycled papers have made a modest rate increase a necessity for Distinctive Stationery Products.

But we are also introducing new payment terms to allow you to continue your purchases under this year's budget. Here's the plan. You can:

- Place new orders with no down payment
- Pay no interest charges if you pay the total balance within 90 days
- Add new orders anytime—each with 90-day interest free terms

We hope you will take advantage of this new payment schedule.

Thank you once again for your support and commitment to Distinctive Stationery. We still think it's the finest available in the country.

Sincerely,

Rate Increase or Policy Change (Example 12)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Rebecca:

Thank you for the recent opportunity to meet and talk about the proposed changes to our fee structure. As we discussed, we are committed to maintaining the positive working relationship with The Bean Sprout and want to underscore that commitment by continuing to customize our services to fit your needs.

The increase in price, our first in four years, is due simply to economics. We have restructured our basic package of services to accommodate fax orders and to include free delivery. Additionally, we can offer you a 15 percent volume discount on all your bulk purchases.

The effectiveness of our service and our positive relationship with The Bean Sprout has been influenced by:

- The freshness of our stone-ground baked goods
- The quality of our organic produce
- The seasonal variety of produce available
- Our ability to provide the range-fed poultry you need quickly

We are eager to continue providing The Bean Sprout with baked goods, organic produce and range-fed poultry, and I look forward to speaking with you again soon about your plans.

Sincerely,

Customer Satisfaction Survey Letter: Guidelines and Alternate Phrases

▶ **Briefly pave the way for your request for suggestions.**

We've said it before and we'll say it again: We think of our customers as a board of directors. And again it's time for our "board" to make a decision.

In an effort to update our products and their usefulness to our customers, we need your input on how you use our equipment.

Can we ask you for your advice?

We have undertaken to reach some goals that most of our competitors would think are impossible. And we need your suggestions for reaching them.

As part of our re-engineering project, we ask that you respond to a survey regarding areas of our operations that affect you as a customer.

We need your help to make changes that will improve our service.

▶ **Be as specific as possible in what kinds of suggestions you want. Enclose a questionnaire to make voicing suggestions easier and less time-consuming.**

We've enclosed a questionnaire to make it easier for you to tell us how you feel.

The enclosed survey will tell us what you think about what we've done and what we should be doing.

Your comments about our order-taking process will enable us to serve you better in the future. Please be specific, and don't worry about hurting our feelings. We want to improve!

We'd like you to focus on our delivery process and how it could be improved. If you have additional comments after answering the questionnaire, please add them on the last page. We value your opinions, so we are counting on your input.

▶ **Make it easy to respond; remember that their cooperation is voluntary.**

The questionnaires do not need to be signed.

Just put the survey in the enclosed envelope and drop it in the mail.

We have included a self-addressed envelope for your convenience in responding.

The enclosed \$2 bill is a our advance way of thanking you for your help with this survey.

▶ **Show the reader that you appreciate his or her time and effort in replying.**

We appreciate your help with this questionnaire just as we value your support of our products.

Without customers like you, we would have no business. Thank you.

It won't be long before you receive information about the changes resulting from this survey. We believe we both will benefit from your comments.

Customer Satisfaction Survey Letter (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Li:

Your experience is important to us. The enclosed customer survey focuses on you, our customer, and your needs. Your response will help us identify assets—and areas that may need improvement—in our products and services.

Please take a few minutes now to fill out and return this questionnaire. Your confidential response will help us take stock of “where we’re going” and “what needs doing” to meet your future needs.

Thank you for taking the time to share your opinions.

Sincerely,

Customer Satisfaction Survey Letter (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Hernandez:

Ever since you made your first purchase from us, we've been striving to bring you an even better package of benefits tailored uniquely to your needs. In fact, we've enclosed a survey to see if we're on target. You can help by filling it out to let us know what you expect from us in the future, as well as shortcomings in our past performance.

Please accept my thanks for taking these few minutes to complete the survey. And again, let us thank you for allowing us to serve Electrolite in providing quality fiber-optic cabling.

As always, you have our commitment to unequalled service. We appreciate the ongoing relationship with Electrolite.

Sincerely,

Customer Satisfaction Survey Letter (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Glenn:

Thank you for selecting our Aeroflight running shoes to help you exercise comfortably and safely. My staff and I have made a personal commitment to ensure customer satisfaction through an absolute dedication to excellence in the operation of our Feet First outlets.

Would you please give me a call at 1-800-555-9362, ext. 421, with your opinions on how we're doing in meeting your expectations? In keeping with our commitment, I am specifically interested in your observations of the performance of our Aeroflight shoes. Also, we want the opportunity to correct any problems immediately .

If you prefer to write your comments, please use the space below and drop this letter back in the mail to me. Postage is on the reverse side. I'm anxious to hear from you.

Sincerely,

Customer Satisfaction Survey Letter (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Goodman:

Because we sincerely want to serve your office cleaning needs, we'd like you to tell us what direction to take. You can help us make our cleaning service more valuable to you by taking just a moment or two to drop us a line.

To "prime the pump," I'm providing a few starter questions. You can answer one or more of them, or share any of your own ideas with us. For starters, how about:

- Should desks and workstations be dusted at night or left alone?
- What kind of rule should our staff follow with regard to papers left on the floor?
- What other services would you like to see performed at night when we do our cleaning? Perhaps we could take them on.

Just drop Michael Ray a note with your suggestions. We're interested in hearing what you have to say.

Sincerely,

Decision Not to Do Business: Guidelines and Alternate Phrases

▶ **Thank the reader for his or her interest in doing business with you.**

We appreciate your taking the time to write us about....

We are pleased to learn of your interest in....

▶ **Explain tactfully why you are declining to do business.**

Major factors in our decision in this case are time and short deadlines. We simply cannot....

We are concerned that we will have difficulties in....

At this time, we are having difficulty obtaining a sufficient supply of parts for our existing orders and are unable to commit to additional customers.

Delays in construction of our new manufacturing plant require that we decline your order at the present time.

▶ **Suggest that it may not be in the best interest of the reader to do business with you.**

We think that you'll agree on the sticky issues of....

You probably are as aware as we are, if not more so, of the dangers in....

In these matters, we would want you to be completely satisfied, and we simply cannot guarantee our services under these circumstances.

Our long-standing policy of firm delivery dates is one reason you have purchased from us in the past. We do not want to disappoint you or mar our record.

▶ **Refer the reader to another firm that may be able to provide the product or service.**

If you're still interested in pursuing this project, you may want to contact Belling-Well International in London.

We know that there are probably several other firms in the state that can do this sort of thing for you. Perhaps you can check the directory published each year by....

We suggest that you call Hartford Inc. at 501-925-1714 to see if they might be able to serve your needs in this situation better than we could.

▶ **Express appreciation for the contact.**

Thank you for writing us.

Thank you for having your representative call on us.

We appreciate your interest in discussing the matter with us.

Situational Conflict

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Crawford:

Thank you very much for your comments about the Hazardous Waste Detection Instrument series we manufacture.

Your Southfield project sounds like a good idea; however, our company doesn't take on such work because we do not have the required federal license in your area. Therefore, we must pass up this opportunity.

I have, however, shared your needs with one of our colleagues, David Moore of Horizon Instruments, who has expressed an interest and will be in touch with you in the next few days. Perhaps you two can work out a better arrangement than we could have offered you under our circumstances.

In any event, best wishes with your project.

Sincerely,

Unprofitable (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Tracy:

Thank you for your March 23 letter offering to purchase a portion of the Bennett Ranch property. We have evaluated your proposal, and after careful consideration, must respectfully decline the offer.

We are presently not pursuing the sale of Bennett Ranch or its facilities. However, should you be interested in acquiring smaller properties, please let us know and we will mail you other, more specific information.

Very truly yours,

Unprofitable (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mrs. Dori:

Thank you for writing us about representing your agency in the public-speaking and seminar markets.

After our telephone conversation June 5 in which you mentioned working with several other agencies on these same objectives, I do not believe that it would be in the best interest of either of us to sign an agreement on these projects. As you know, to market speakers appropriately we do many elaborate brochures and spend a great deal of money on telemarketing services. To get the necessary return on this investment, we need to have our clients agree to an exclusive arrangement for representation. And because we also understand your desire to continue to market your own services, we think you'll agree that neither of us would be completely satisfied with any contract we might draft.

We do know of other agencies that don't require exclusive contracts—Buckingham Associates in Dallas is one. Perhaps you may want to contact that organization.

Thank you for your interest in our agency and best wishes in all your speaking and seminar efforts.

Sincerely,

Unprofitable (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear George:

Thank you for taking the time to explain your irrigation needs at Oakland Orchards. It sounds as though you have spent a great deal of time setting organizational goals and deciding on just the plan to get you where you want to go.

But frankly I'm disappointed. In putting the numbers together, I can't figure a way that we can really give you the quality products and service we like to provide at the price your budget allows. I wish I had a more positive answer. But we would never consider contracting to provide any work that we could not fully guarantee. To offer such a guarantee and quality products and workmanship, we feel that we could not stay within your price expectations. But we do appreciate your considering our firm for the work.

I am very impressed with the operations of your company and wish you the best for future growth.

Sincerely,

Confirmation of Meeting Agenda: Guidelines and Alternate Phrases

- ▶ **State when the meeting has been scheduled. Other brief details such as where, what time, and why can usually be given in one “message” statement.**

As we discussed, the next and final planning meeting for the Oktoberfest will be at 10:00 a.m. Monday, August 21, in the Post Conference Room.

Plan to join us for the next monthly Horizons meeting: 12399 Silvan Avenue, Suite 299, 4:00 p.m. on Tuesday, August 22. We’ll be discussing how....

We hope you will be able to attend the next monthly budget meeting (Tuesday, August 9, 9:00 a.m., conference room C) to give your input on the....

- ▶ **Ask for confirmation of attendance so that if key people will be unable to attend or if necessary information is unavailable, you can reschedule. It is better to cancel than conduct meaningless meetings.**

If you cannot attend, let me know as soon as possible so that we may reschedule the meeting to have a majority present.

All interested parties are invited to attend.

We do not need a confirmation of your attendance, but we hope to see you there.

We will forward a full information packet to you as soon as we receive your confirmation.

Since these semiannual conferences have been over-subscribed in the past, reserve your place by responding this week.

Due to space limitations at the Innova Building conference room, we must limit the number of attendees. Please let us hear from you soon.

- ▶ **Include the meeting agenda so that attendees know specifically which direction their thought, planning, and comments should take. Generally stated topics such as “technical problems” give few clues for attendees to come prepared with data, questions, or comments. Also, include time allocations for agenda items. Although these cannot always be adhered to, stated guidelines help attendees know the depth of discussion expected and later keep the meeting from getting bogged down in insignificant detail. Time limits and the order of agenda will allow those whose presence is not required for the entire meeting to come late or leave early.**

Confirmation of Meeting Agenda (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Kempler:

Your key decision makers and strategic members of your organization have scheduled a rewarding experience for June 5 at 3:00 p.m. in your office.

In this meeting, we fully expect to focus on problems and strategies to meet your sales objectives for 20—. We have planned an intensive process to result in action relative to your organization. The following topics have been scheduled and others you may want to include can be added:

- Customer service
- Client referrals
- European marketing

We hope to provide a productive atmosphere for our most objective thinkers. Please call if you'd like to add any issues to our open agenda. I'm looking forward to our discussions.

Sincerely,

Confirmation of Meeting Agenda (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Jackson:

As we agreed regarding the upgrade issues that concern you, I have enclosed a general description of the agenda for your review in preparation for our April 9 meeting at our headquarters. I have arranged to have John Harding, Jim Gilmore, and a principal of our firm in attendance. We are all looking forward to participating in this session, which we feel will serve as a vehicle for your planning concerns.

Let me emphasize again that we want to establish a partnership in which we understand your requirements and provide whatever resources and expertise you need to make your final decisions.

If you should have any questions after reviewing the enclosed agenda, please call. We want to keep things open-ended, but focused on your concerns.

Sincerely,

Confirmation of Meeting Agenda (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Roth:

Enclosed is our draft of the agenda for the upcoming meeting scheduled for March 18. Please let me know if you would like to make any changes to this agenda before we distribute it to the attendees.

If we don't talk before then, I'll meet you in the front lobby of the Thompson Building at 300 Congress Avenue at 10:00 a.m. on March 18.

Sincerely yours,

Postponement of Meeting: Guidelines and Alternate Phrases

- ▶ **State your nonattendance at the meeting immediately. Be sure to include details about relevant time, place, or purpose so that your reader is not confused about which meeting.**
- ▶ **Give the reason for your absence: Do you not want to attend? Is the scheduling a problem? Others may decide to postpone or cancel the meeting according to your response. To give no reason at all makes your decision sound arbitrary.**

Under doctor's orders, I must decline to attend the meeting in Atlanta; travel is much too strenuous during my recovery period.

I will be unable to attend the May 6 meeting due to a scheduling conflict; I'll be attending the IAVF convention in Orlando.

I regret that I won't be able to participate in the May 12 conference; I'm scheduled for some minor surgery that week.

- ▶ **Apologize for the inconvenience of the cancellation.**

I know you spent time in planning your attendance, and I regret the inconvenience.

I always regret having to cancel anything at the last minute because of the inconvenience we cause you, our customers.

Please accept my apologies for the postponement. Your attendance, I'm sure, involved some wasted planning time.

I apologize for having to ask you to "unmake" your plans. That's always irritating and inconvenient. I just hope the day can be used now to even better benefit.

- ▶ **End with a positive note. You may want to announce or suggest ways you can accomplish some or all of the meeting objectives under the conditions stated.**

Postponement of Meeting (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Johann:

We're looking forward to learning more about your company so that we can propose the most appropriate equipment to help you accomplish your 20- goals.

Would it cause you a great inconvenience if we postponed our January 15 appointment until the week of February 1? Because your business is important to us, we wanted several of our staff to meet you during this initial discussion—Frank Rizzo, vice president of marketing, Saul Rosenberg, one of our technical specialists, and Beatrice Benson, our design engineer. Coordinating our schedules has been difficult because Frank travels so extensively.

I'll phone on Tuesday to see if the week of February 1 will be a possibility for you. If, in the meantime, you have other questions, concerns, or suggestions, please let me know and we can go ahead with the meeting as previously scheduled. We're looking forward to establishing a long-term, mutually beneficial relationship with Random Act Associates.

Sincerely,

Postponement of Meeting (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Juan:

Since we spoke on September 21, I've given further thought to your needs for specialized document storage and retrieval service. Although we would, of course, do our very best, I'm not sure we could meet your expectations with our present staff.

Therefore, I suggest that possibly we postpone our October 15 meeting until you have spoken with several of your other managers about their needs in the branch offices. If, after that evaluation, you think we can handle the volume you've projected, let's talk further. I would hate to waste your time by not being able to deliver the excellent service our clients have come to expect.

Please let me know if we should talk further.

Sincerely,

Placing and Filling Orders: Guidelines and Alternate Phrases

- ▶ **Place the order with all details as to stock numbers, purchase-order numbers, catalog or model numbers and descriptions, quantity, size, color, or type.**
- ▶ **Give any special shipping instructions and delivery dates or arrangements.**

Will you please make every effort to ship the equipment by August 1?

We must receive the merchandise by August 1. If it is shipped to arrive after that date, we cannot accept it.

We ask that you arrange back-door delivery because of the bulkiness of the merchandise.

Please ship the books by special UPS two-day air. We will reimburse the extra shipping charges for this quick service.

- ▶ **Mention method and details of payment.**

Please ship C.O.D.

We've enclosed the required 50 percent deposit (check #2456 for \$866.78) and understand that the net will be due within 30 days after you ship the order.

When invoicing us, please use purchase order #234782 and send the billing directly to Accounts Payable at the following address: (address).

Filling an Order

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Hyde:

On May 6 we loaded 19,895.38 barrels (835,605.96 gallons) of natural gasoline on board the *Startrack 2000* under tow of the *Hughie E*. This is the third delivery on our contract #4899994, which now has a remaining balance to be delivered of approximately 10,000 barrels.

Freight for this movement was \$6,465.

We have invoiced your account for this product and associated freight. As a matter of record, our next delivery to you is scheduled for August 1.

Thank you for doing business with us.

Sincerely,

Placing an Order

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Stewart:

We would like to order four dark oak desks (catalog #234D) at \$698 each. Please ship them with your normal trucking firm in the least expensive way.

The ship-to address is:

Reynolds Paper and Supply
14566 Riverside Drive
Houston, TX 77070

The invoice should be sent to the following address:

Accounts Payable
Hammond Insurance
12444 Elk Drive
Arlington, TX 76015

On your invoice, please refer to our purchase order #349598. Thank you for your prompt service.

Sincerely,

Delaying Order Because of Misfortune: Guidelines and Alternate Phrases

- ▶ **Tell the customer that you can or cannot ship the order, repeating key details of description and delivery.**
- ▶ **Explain the cause for the delay.**

As you know we are a small, family-owned operation and Frank Heath, our owner-president, was killed in an accident last week. The warehouse has been closed during our effort to deal with this tragedy.

As you may have heard, our distributor on this product has declared bankruptcy and can no longer provide us with the quality merchandise we expect. If you can wait, however, until....

The earthquake last week completely destroyed our factory in San Jose. We are shifting production off-shore, but there will be a delay in shipping your order.

We are working to find new distribution methods during the Teamsters strike. Unfortunately, so is the entire industry and the rail and air shippers are overwhelmed. Please bear with us. We will deliver your order as soon as we can.

We have experienced quality control issues with the manufacture of the KP31. While we are correcting them as quickly as we can, our production is backing up.

- ▶ **Suggest replacement merchandise if you cannot ship what the customer has ordered, but never presume upon readers by telling them they will be absolutely satisfied.**

Would you consider trying our...?

We would like to suggest that you give one of our newer products a trial run....

For the purposes you've outlined in your letter, we think you might be equally pleased with.... May we send one to let you see how it works for you?

While we are unable to provide the Questar model you ordered, we can offer you a 10 percent discount on the Ramstar if you are willing to use it in your application.

- ▶ **Thank your customers for their interest in your products and their patience in receiving their orders.**

Thank you for your confidence in our products.

Thank you for thinking of us again.

We appreciate your checking with us before deciding on your purchase of this equipment.

Your continued support is very important to us and we will rebuild our facilities in record time so that we will once again be able to supply your assembly line.

Delaying Order Because of Misfortune

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Tanner:

We received your order #556688 (dated April 22) for assorted office supplies but regret to say that we cannot fill it by your requested ship date of May 1.

Unfortunately, fire last week destroyed most of our inventory. Because we have had some delays in our insurance settlement and were in the process of moving into a new warehouse when the fire occurred, we have temporarily closed our office for 30 days to allow time to restock and to relocate our offices and warehouse.

Therefore, we are returning your check with this letter. If you find you can wait for 30 days on this order, please let us know and we will be happy to ship your merchandise at the low prices you've come to expect from us.

We've also enclosed a new catalog that had just been completed and was still sitting in the printer's office the day of the fire. We hope you'll find other supplies you need to order when we reopen.

We appreciate your patience during this difficult time for us. Thank you for your patronage through the years.

Sincerely,

Delaying Order Because of Missing Information or Errors: Guidelines and Alternate Phrases

- ▶ **State what you are doing about the order. Will it be shipped immediately when the customer sends further information? Are you restocking? Have you discovered the error in shipment, and have you replaced the damaged products?**
- ▶ **Explain briefly how the mistake happened.**

We had no idea that we would have such an overwhelming response to our sales letter. We find ourselves totally embarrassed by the lack of stock, but we can assure you....

We apologize for such a goof. Evidently the order was filled by some of our part-time summer help while our regulars were on vacation.

The message was not passed on to me about the special ship date, but I should have followed up myself after our last phone call. Please accept my apology for this miscommunication on our part.

- ▶ **Reassure the customer that you will get the order correct.**

I have made a note on my calendar to check with the shipping people personally on Friday to see that the order has gone out.

I do have your order on my desk and have made the necessary changes in the information you asked us to imprint on the handle. I'm sending you a copy of your revised order for your files.

Your order has been red-tagged with our code that identifies special-delivery orders. We will be monitoring the work daily.

- ▶ **Express your appreciation for the business and reestablish rapport if the error has been yours.**

We wish you the best in setting up your displays.

Thank you for doing business with us.

We value our customers' goodwill. Thank you for giving us an opportunity to replace the damaged merchandise.

Thank you for your patience.

Thank you for calling the error to our attention.

Thank you for phoning with the additional information; we will revise your order accordingly.

We have revised your order as you instructed today on the phone. The mower should be rerouted by Thursday, and we hope you enjoy using it.

We hope you enjoy the books.

We want to ship you your next order at a 10 percent discount—just our way of apologizing for this error.

I've enclosed a new catalog for your upcoming season. We'll look forward to your next order so that we can give you the prompt attention you deserve.

Delaying Order Because of Missing Information or Errors (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. White:

We will be happy to ship your three word-processing software packages (your purchase order #45899 dated May 6) as soon as we have the specific package titles and release numbers. Evidently you ordered from an old brochure—one prepared during the time we were distributing only one package, the WriteRight. We have now added four other word-processing packages to our product line: WriteOne, Letter Perfect, WordPro, and OnWord.

Please refer to the enclosed brochure and tell us which of the four software packages you need (order numbers are included with the product descriptions). We also assume you want the latest release of whatever package you choose.

Thank you for writing. We'll be happy to ship your software the day we get your further information. If you'd rather phone, please call our Order Department at 914-345-6789.

Sincerely,

Delaying Order Because of Missing Information or Errors (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Brancobar:

We have replaced your shipment of damaged control units (purchase order #245599), and you should have your purchase by the time you receive this letter.

Frankly, we are puzzled about how the units ever left our warehouse without the proper packing insulation. Our only explanation is that someone from either our warehouse or the trucking company mistakenly picked up a unit that had been returned for repair (and improperly packed) and placed it on the truck with the other boxes.

Whatever the case, we apologize for your having to point out our mistake to us. We have cautioned our warehouse personnel about mislaid (even for a few minutes) equipment returned for repair and should have the problem corrected now.

By now you should be “happily installed” and up and running. Best wishes with your other expansion plans.

Sincerely,

Delaying Order Because of Missing Information or Errors (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Cracker:

We are holding your printing order in the pending file until we receive your deposit for one-half the order amount, \$480. As our brochure explains, our printer must have this guarantee before he will begin the job.

We regret the inconvenience in your having to attend to this order twice. However, as I'm sure you can imagine, customers do sometimes change their minds about their printing needs after placing their orders with us. And, of course, specially printed labels such as yours cannot be resold to another customer. We hope you understand our policy of requiring a deposit on all such custom orders.

We can assure you of the finest quality printing and a speedy turn-around time. Just let us hear from you about how you plan to handle the deposit, and we'll go to work on your labels. We appreciate your business.

Cordially,

Request for Commendation Letter from Satisfied Customer: Guidelines and Alternate Phrases

- ▶ **Mention the reason for your request for reference.**

Our new advertising campaign will feature some of our satisfied customers. Would you like to be involved? The nationwide coverage should be beneficial to both of our firms.

- ▶ **Be as specific in what kinds of comments you want as possible without seeming to “script” your reader’s response. Explain how you intend to use the reader’s letter and who will see it. The more specific you can be in your request, the more appropriately the recipient can respond.**

We are developing a “Why You Should Do Business with Alexco” brochure that we hope will explain to potential customers what keeps our long-term clients satisfied. We would appreciate your addressing your comments to that explanation.

In order to properly validate the implementation of our new quality control system, we need specific information about your reactions to our new telephone ordering system. Please direct your response to that objective.

The ad campaign focuses on our commitment to on-time deliveries and your remarks should relate what that means to your business.

- ▶ **Show the reader that you appreciate his or her time and effort in replying. Remember that this request, often considered a personal rather than a business matter, takes time away from his/her more important tasks.**

Thank you for your trouble.

Thank you for providing this help. We’ll be happy to return the favor for you if we are ever in a position to do so.

Thank you so much for your help in this way.

I appreciate your time in doing this favor.

My thanks for writing on our behalf.

We know that your days are already filled with requests, thank you for taking the time for this one from us.

Request for Commendation Letter from Satisfied Customer

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Bill:

You've been such an excellent, long-time customer that we hope you'll agree to do us a favor. Would you please write us a letter telling us what you think of our computer products and service?

No, we don't intend to spend a lot of time patting ourselves on the back. What we have in mind, instead, is to have your letter on hand to show when others ask why they should buy our products and do business with us.

If you agree to write us this commendation letter on your company letterhead, you may want to comment on the following:

- How you heard of our products/company
- What led you to decide to buy from us
- Results your employees have had since using our products—safety, increased productivity, ease of use, and so forth
- Any comments from your staff about our products or the way we handle your account

Thank you so much for taking the time to do us this favor. We value your comments and our long-term relationship.

Sincerely,

PART 3

GOODWILL & ONGOING CUSTOMER RELATIONS

41 READY-TO-USE LETTERS

Anniversary of Customer Relationship: Guidelines and Alternate Phrases

▶ **Mention the reason for the letter—the anniversary date.**

Next month will be the second year you have subscribed to our services. We are so glad you have chosen to work with us.

A celebration is in order! We have been doing business together for two years now.

▶ **Express your appreciation for their patronage.**

Thank you for your business.

We appreciate your attitude about doing business.

We consider you a friend as well as a customer.

Clients such as you make our job easy.

Thank you for the confidence you've placed in our company.

We appreciate your trust and confidence through the past five years.

I can't think of a single client relationship I've enjoyed more.

We value your business a great deal.

You have our heartfelt gratitude for your patronage.

Please know how very much we appreciate your business.

▶ **Ask for any commendations or recommendations the customer may have.**

Please tell us if we can do anything to make our services more helpful to your company.

How are we doing in meeting your expectations? Please give me a call at 1-800-555-9362 and let us know.

- ▶ **Express your continuing commitment to your customers. You may offer a gift, a product or service discount, or simply a goodwill statement.**

We don't want to change a thing in our way of doing business. We plan to keep the prices competitive and the service efficient.

We pledge our continued efforts to improve our service to you.

To show you how much we have appreciated your business over the years, we want to offer you a 15 percent discount on any supplies you order during August. To receive this discount, simply present this letter with your order.

- ▶ **State that you look forward to a continued business relationship.**

We look forward to a continued, mutually beneficial relationship with you during the coming years.

We will continue to do everything possible to maintain your trust in our expertise.

Best wishes to you and your staff for the decade to come.

A pleasant relationship with clients such as you is one of the things that makes our business so enjoyable.

We look forward to many more years together.

Anniversary of Customer Relationship

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Brooks:

It's your first anniversary as a proud owner of a Tucker automobile, and we hope the year has been a great experience. Please stay in touch with us about your experience using your car day-to-day. We love to collect success stories about our customers. Our satisfied customers are always our best cheerleaders and salespeople.

Our number-one priority here at Tucker is to see that you are completely satisfied with your car. Our attention to detail is underscored by our ongoing service program.

Thank you again for the confidence you've placed in our product and service.

Sincerely,

Anniversary of Your Own Firm: Guidelines and Alternate Phrases

▶ **Mention the occasion you're celebrating.**

We've passed a milestone and we're celebrating. This month marks our fifth year in the Brownville business community.

We'd like you to join us in celebrating our fifteenth anniversary.

This year marks our tenth anniversary in the Harrisburg community of friends.

Ten years of hard work, sincere referrals, and repeat customers—we're celebrating our anniversary this month.

▶ **Thank your customers, clients, suppliers, and other colleagues for their part in your successful business operations.**

We appreciate your contribution to our success—your loyalty and your own dedication to service.

Thank you so much for your part in our success—your purchases, your confidence, and your referrals.

Without your confidence in our products and services through the years, our story would not have been so successful.

You've bought our products, shared your concerns and your needs with us, and passed our name on to your friends and colleagues. Because they respect you and your opinions, they bought from us. And for that, we owe you a great deal of appreciation.

Thank you for trusting us to give you the kind of service you've needed through the years.

You've been patient with the new employees through the years as they learned your names and your needs, you've been loyal to keep buying from us, and you've been talkative in passing on our name to colleagues. How could we ask for more? Thank you so much for contributing to our success.

- ▶ **Express appreciation for those who have helped you grow. You may offer a commemorative gift, a product or service discount, or simply a goodwill statement.**

Through the years, we have continued to appreciate the goodwill and business of customers such as you.

We want to take this opportunity to recognize and thank the valued customers who have expressed confidence in us and who have been so loyal to our products.

To show you how much we have appreciated your business over the years, we want to offer you a 15 percent discount on any supplies you order during August. To receive this discount, simply present this letter with your order.

We are mailing separately a copy of *Financial Recordkeeping* as a small token of our appreciation for your business over the years.

As a new business, we tried to impress you with our fast service and knowledge of the merchandise. And as a “mature” business of ten years, we’re still trying to impress you. That’s why we want to offer you....

As our way of thanking you, we’re enclosing a certificate good for....

To celebrate, we’re offering a 10 percent discount on any workshops booked within this month.

- ▶ **End with a challenge for the future.**

We pledge our continued very best service. You deserve it.

Thank you for helping make this a great ten years. We plan to keep your needs in mind as we grow.

We plan to keep on listening to your needs, and we will never forget that your ideas and business have helped keep us on target.

We will continue to offer you the best accounting services in the state. Thank you for your patronage.

Thanks to your business and partnerships, we plan to live happily ever after—serving you.

We don’t want to change a thing in our way of doing business. We plan to keep the prices competitive and the service efficient.

We pledge to you our continued efforts to improve our service to you.

We plan to continue our efforts to listen to what our customers have to say and to educate ourselves on the changing needs of our world.

Our continued growth depends on our attention to customer needs and wants. So you, as customers, will remain center stage in our upcoming months of production!

Thanks to you, we plan to keep on growing.

We have a challenging decade ahead. With our customers as partners, we can change the way the industry does business.

We're excited about the challenging decade ahead.

We plan to listen more, hire smart, sell low, and serve right.

Anniversary of Own Firm (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Hassler:

Exposure Technology is dedicated to making your company look better in print.

As part of our fifth anniversary celebration, we want to share with you some of the progress we've made over the years and have taken the liberty of highlighting those achievements in the enclosed brochure. While leafing through the pages, you may even see someone you know as a user of the services we provide. To all our loyal clients, we offer a big thanks.

Over the last decade, we have taken great strides in adapting to a changing environment. We realize that tomorrow will bring new discoveries, new technology, and new demands from our public relations-conscious community. Our continuing goal is an ongoing commitment to keep step with changing public opinions and trends.

Our main concern is keeping your company's name a household word.

Sincerely,

Anniversary of Own Firm (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Hale:

Thanks to you and the people of our fine community, we have had another outstanding year—our eighth year here in Seattle. Our real joy is to have met and helped so many families moving into the community. We value your friendship and trust and want to continue serving your recycling needs now and in the future.

Our success in Seattle was possible only because of your support and confidence in us as professional team members. Thank you for also referring us to your business associates and friends.

Warmest regards,

Announcement of New Location: Guidelines and Alternate Phrases

▶ **Announce your company's new location up front.**

We're growing. As a result, we've taken on a new location in the Bennington area.

We've moved. Come by and see us at our new location: (address)

Our name has changed, but our superior products continue to get the same high marks from customers. Our new name, Univex, Inc., will now be the one you see in industry journal ads and product literature. We have a new address also: (address).

Please make a change on your Rolodex and in your files: Uninex now has a new name and a new address: (address).

▶ **Include effective dates if the announcement precedes the actual change.**

All these changes are effective immediately.

Look for us at this address November 1.

▶ **If appropriate, take this opportunity to sell. Focus on some new aspect of your service or product, or simply remind readers who you are and what you can do for them. Tell them what the change means in terms of benefits.**

This new name and address will involve several changes. Over the next few months, we'll be identifying ways to help you communicate faster and more economically. So, you'll be hearing from us several times in the coming weeks about new branches opening nearer to you, about new rate schedules, and about additional staff to solve your communication problems.

This new location represents a new attitude on our part. Oh yes, we've always wanted to provide superior service, but now we don't expect you to have to look so hard to find us. This new location is only 3-5 minutes from your downtown office.

We have a new mission as well. Our goal is to improve the quality of your customized graphics by upgrading our software to include such new capabilities as....

Announcement of New Location (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Hamilton:

Effective March 1, First Bank and National Savings and Trust merged and became the largest and strongest banking institution in the southwest. As a result of this, we now have branches that serve people in the most remote neighborhoods.

The transfer of your account will take place automatically; there is nothing you need to do. Service to your account will not be interrupted. It will be business as usual—just at a new location at 45th Street and Lamar Boulevard—beginning April 1.

We still offer you the finest service:

- No service fee on Checking Plus accounts
- 24-hour ATM service at over 400 locations throughout the southwest
- Open Saturdays until 1:00 p.m.

So come see us at our new location. We look forward to serving you!

Sincerely,

Announcement of New Location (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Hornsby:

Please accept my personal invitation to visit our store at our new Palo Duro Road location. Our fall/winter collection sale begins on November 1 and promises to be our greatest ever. Why do I have such confidence?

- Every item in the store is at least 25 percent off!
- Aspin T540 Mountain Bikes are on sale for \$350–50 percent off their usual price!
- You get free kneepads with every purchase of adult in-line skates!

Wheel Estate's innovations in alloy crankshafts and center-pull brake technology—a whole new dimension in bicycle accessories—will be on sale only until the end of the month and only at this new location.

This is a great opportunity for generous savings. So shop early!

Cordially,

Announcement of New Location (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Powell:

WE'VE MOVED! There's a new address but the same commitment to quality and service you've come to expect.

New address: 34 Baltimore Road
Fort Worth, Texas 77777

Old address: 1400 Swiss Avenue
Haltom City, Texas 77776

New phone number: 817-555-6767

New FAX number: 817-555-7676

Please make the appropriate changes in your records. Thank you.

Cordially,

Article Sharing: Guidelines and Alternate Phrases

- ▶ **Mention the article you're sending. Explain why this article should be of interest to the reader.**

The enclosed article seems written just for your situation. Have you seen it yet?

I have enclosed an article I came across in the *Austin American-Statesman*. It discusses the growing high-tech community in Austin. Could this be the testing ground you mentioned needing for the new XC-445?

- ▶ **Avoid making this sound like a sales letter.**
- ▶ **Choose a conversational, "chatty" tone.**
- ▶ **Be brief.**

Article Sharing (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Smith:

We have enclosed a copy of our newsletter, *KTG Communications Marketing*, that you will be receiving four times a year, at no cost.

We'll try to tell you the essential facts regarding what you need to know about the ever-changing communications field. We'll attempt to cut through all of the available details to bring you the essentials. Our plan is to cover such topics as

- Public speaking
- Direct mail
- Telemarketing

This newsletter is our attempt to help you “separate the wheat from the chaff” of available information. We hope you'll find it informative and helpful, and please feel free to give us any suggestions along the way.

Sincerely,

Article Sharing (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Denny:

Since our discussion the other day on the phone, I have given more thought to your underwriting process. You said that your company does not require bonds from construction firms building your projects. Although I'm sure your management has given this careful consideration, you might want to reconsider the option of bonding as a mechanism for transferring the risk in that Hydon project.

I'm enclosing an article I found while thumbing through my files. It answers many of the key questions you asked the other day. Does this make sense in your situation?

Cordially,

Article Sharing (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Peter:

Thank you for meeting with me yesterday to discuss your current distribution needs and your concerns about handling future interstate shipping.

I've enclosed a reprint of an article about another cross-country shipping company that solved its problems with the solution you and I discussed. This article may also raise some questions about upcoming federal legislation.

I'll be meeting with Abe Kreggs next Monday, March 3, at 11:00 a.m. In case you have any additional questions, I'll plan to stop by your office after that meeting.

Sincerely,

Article Sharing (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Paul:

In the enclosed issue of *Runner's Week*, there's an article I think you'll be interested in reading. (See page 34.)

The article discusses a sporting goods store, very similar to yours, that recently improved its sales of running shoes to teenagers by implementing some of the solutions we've been discussing during our recent conversations.

The article will probably generate some additional concerns, so I'll phone you on June 3 to hear your reaction.

Cordially,

Article Sharing (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Sam:

No, Sam, I did not forget my promise to send you a copy of the newsletter with the article about semiconductors. We, unfortunately, ran into several delays with our printers, and the fall date ran into winter very quickly. Even though it is somewhat late, I hope you enjoy the enclosed issue, especially the articles on semiconductors and fiber optics.

Thanks again for giving your views on these trends. As you can see by the article, your advice fits very nicely with that offered by other professionals.

How about joining our professional organization some time? We could certainly profit from your experience and expertise.

Sincerely,

Article Sharing (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Bob:

I'm attaching a reprint of the article "Selling Clients on the x546 Processor" that appears in the December issue of *Computer VAR*. This article served as the basis for Mark Richman's speech on the same topic at the January 5 conference in Dallas that we both attended.

The article highlights a comprehensive approach to the way others in our industry are doing business. Specifically, it details ways of calming customer concerns about the processor's accuracy.

Please call me if you would like more information about how we can help you improve your effectiveness in this arena.

Sincerely,

Birthday Greetings: Guidelines and Alternate Phrases

- ▶ **Mention the occasion, but don't be overly familiar in counting. A humorous approach adds a nice touch.**

Today is special—it's your birthday.

Someone around here dropped the word that today is your birthday.

Didn't we celebrate your birthday about this time last year?

We're both getting older these days—one of us is also getting better! Happy birthday to that one!

This week marks a special occasion, your birthday.

- ▶ **If you know the person well enough and can do so sincerely, tell the person one specific thing you appreciate about him or her or the relationship in general.**

You're always so accommodating when I'm in your office that I couldn't let the day go by without notice.

- ▶ **Wish the reader a happy celebration and many more years.**

Celebrate long and hard—birthdays come only once a year.

I hope the day brings fun and happiness.

I wish you the best today and the rest of your life.

Here's to many more such occasions.

Our best for many more happy years together here at Arvark.

Many, many, many more.

One wish for you—not a wasted day or year of your life. You deserve to enjoy every minute ahead.

Much happiness as you celebrate today.

Much happiness as you enter the next year and forever.

Birthday Greetings (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Max:

According to our records, today is another milestone for you—your birthday. You’ve gathered another year’s experience and wisdom—two commodities one can never get enough of.

We’ve appreciated your business throughout the past years. Congratulations!

Sincerely,

Birthday Greetings (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Cylinda:

Another year in which to excel. Rumor has it that during this week every year you have a birthday. Happens to the best of us.

Seriously, all best wishes to you for a pleasant day with friends, family, or staff.

Cordially,

Farewell to Customer: Guidelines and Alternate Phrases

- ▶ **Inform the reader in a positive, upbeat manner that you are leaving your present position.**

I'm writing to let you know of my good news. I have recently had an opportunity to....

Jack, I wanted you to know that I will soon be leaving Upjohn here to assume a new position at the Kansas City site.

I've had a change of career plans—effective May 1, I will be impersonating a sales rep. What do you think of my chances for success? Seriously, I wanted to say goodbye to you and....

- ▶ **Mention who will be taking over your responsibilities if the reader will need to continue the relationship with your employer. For example, a vendor may want to know who the new contact within the company will be.**

Jack Gordon will be your new contact for further orders.

In the future, you should call Lisa Smith to coordinate the workshops for your organizations.

I'll be replaced by Mike Treadwell, who will very capably service your account when you have needs or questions.

Your new company contact will be Sarah Hughes. Sarah has heard me speak of you often and is very eager to meet you and find out more about how you can work together.

- ▶ **Express your appreciation for the association, being specific about the benefit or value either to you personally or to the company.**

The hours have been long, but the work has been so satisfying.

Your contributions have been invaluable to my sales success.

I can't think of a client relationship I've enjoyed more. Your investments are with a sound company, and I pledge to leave you in good hands.

The trips on which I accompanied you to our annual conventions have been some of my most memorable times at Hightower. Thank you for your guidance and friendship.

- ▶ **Mention any plans to stay in touch.**

I'll drop in on you from time to time.

Farewell to Customer

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Marshal:

In case the town crier hasn't reached you with the news, I have accepted a position with Electroplan, effective June 12. My new position is in the Austin office, so if you need to contact me please do so at 512-555-3241.

Jane Washington will be taking over your account for me. She has been with Macrotech for three years now. She has a lot of experience with software contracting firms like yours and is looking forward to continuing the relationship we have established. Expect a call from her soon.

You have contributed a great deal to my success, and I hope in some way I have added to yours. Thank you for the business you have given Macrotech. I know Jane will enjoy working with you as much as I have over the years.

Regards,

Holiday Greetings: Guidelines and Alternate Phrases

- ▶ **Be brief.**
- ▶ **Mention specific accomplishments and solutions to problems in the past year. Or you may mention anecdotes, recall your pleasant work together, or say that you are looking forward to new or continued business in the coming year.**

Before we usher in the new year, I want to express my appreciation for your business in the current one.

- ▶ **If appropriate, give details about any plans for celebration your company may have.**

Can you join us to share warm wishes on Wednesday, December 18, in the east lobby of our Martin Street headquarters?

We invite you to join us at 3:00 p.m. on December 22 in our office lobby to share sentiments of the season.

- ▶ **Mention modestly any gift you may be sending along.**

We hope the enclosed *Waypole Journal* gives you a sense of the industry feelings about the political and economic climate. Let us know if 11 more issues don't find their way to your door.

Do you think you can find a use for one more desk calendar? This one is special because it marks the anniversary of our first year's service to you.

I'm mailing separately a calendar that I think will bring a laugh or two.

I hope you can use another one of those fruit baskets, ubiquitous around the Christmas season. But mine will be special because it comes with much heartfelt appreciation for the help you've given me this past year.

- ▶ **Express warm wishes for the season. Avoid making the note sound like a "duty." Be warm, creative, and sincere.**

Have a happy holiday.

Cheers.

The very best to you and your company for the coming year.

Holiday Greetings (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Wayne:

The year 20– was one of both extensive growth and challenge in meeting our customers’ needs. We want to take this opportunity to say we are wishing prosperity to you and your staff at Bryan’s Cafeteria.

May the good Lord continue to bring peace, health, and happiness to you and yours in the coming year.

Faithfully,

Holiday Greetings (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Bloch:

It's that time of year again. Fudge fills your refrigerator. Wrapping paper stands in the corner. Your teeth are permanently coated with cider and peppermint.

They are all a welcome relief from the routine. Here at MathCo, you're on our list of favorite people. This past year, we've enjoyed working with you and hope that our exceptional customer service and product quality have met your expectations.

Best wishes this holiday season from us at MathCo.

Cordially,

Holiday Greetings: Thanksgiving

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Brothers:

During this Thanksgiving season more than ever, we gratefully remember you who have made our business success possible. In this spirit we say simply but sincerely, "Thank you." We hope the coming year brings many blessings to you, your family, and your business.

Sincerely,

Holiday Greetings: Valentine's Day

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mary:

Long ago, Saint Valentine created a sentiment that evolved into a holiday celebrating "love." Although this day is usually reserved for sweethearts, we want to get in on the act.

So much happens in our world—both business and personal—that takes our attention away from acknowledging those around us. There's too little time to enjoy family, friends, colleagues, and customers.

Thank you for allowing us at Heathchild's to reach out and share the sentiment of appreciation with you and yours on this Valentine's Day. We value our relationship with you.

Sincerely,

Inactive Account: Guidelines and Alternate Phrases

▶ Express appreciation for past business from the customer.

We haven't talked with you in quite some time, and I wanted to let you know that we've missed your business.

Frank, you've been an excellent customer through the years. And now that it has been 18 months since we've heard from you, we're distressed. An excellent customer like you is hard to come by these days.

For three years we've appreciated such an excellent working relationship with your staff. They have always been efficient, courteous, and helpful.

▶ State that your reason for writing is to regain the customer's business, and ask why he or she is no longer using your services/products.

We've been waiting for another call from you...and waiting. Frankly, we're downright worried that we've done something to lose your business. Would you let us know if there's some problem?

Let me be honest in my reason for writing, Bill. We have very much valued your business over the years, and we're concerned about why we haven't heard from you recently. Would you be frank with me?

I'm writing from a purely selfish motive—we value you as a client. You have always asked for the best service and paid our fees promptly, and we've appreciated that. May I ask why you stopped doing business with us?

This letter is prompted by one thing—we have missed your business and such a solid working relationship with your people. Have we inadvertently done something to lose your confidence?

▶ Make it easy for the customer to reply.

I've enclosed a questionnaire and would appreciate your completing it; it will let us know how we need to improve our services to you.

Would you phone me (234-5567) personally to let me know if there is something about our product or service that needs attention?

Could I impose on you to jot me a note on the bottom of this letter to let me know if there is some problem with your account or our service?

The enclosed, stamped card is for your convenience in letting us hear from you. We will appreciate your letting us know how you feel.

- ▶ **Make an effort to sell. Enclose (if appropriate) or offer to send a new catalog, brochure, order form, free sample, or offer of demonstration.**

Until we hear from you otherwise, we're going to assume that you have not called us simply because you haven't needed our services. We've, therefore, enclosed a brochure that will outline some of our new financial advisory services. Please let us know if we can serve you again.

We hope that we haven't heard from you simply because you've been involved in other projects and that there's no problem with our service. Under that assumption, I'm extending an invitation to a May 1 public seminar introducing some of our new management videos. (See the attached brochure for details.) We'd like to see you again.

Disgruntled Customer (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Baxter:

It has been about 2 months since we last talked—June 11 to be exact. At that time we discussed some concerns you had about our invoicing/inventory system products.

Ms. Baxter, I want to suggest that you take another look at some improvements we've recently made. For one, our In-form-Voice system now has a silent tractor feed printer and bar code reading capabilities.

On the chance that you've not found another inventory system that has met all your expectations and needs, I've enclosed some updated information on our newest In-form-Voice series, along with an order form.

May I suggest another review of how our system can contribute to your bottom-line productivity?

Cordially,

Disgruntled Customer (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Zak:

Some time ago, Nancy, from our office, talked with you by phone and discovered that our customer service department had not given you the attention your account deserved several years ago.

As the new sales representative in your area, I'm wondering if you're now willing to give us another chance to show you that we have appreciated your past business?

Recently we introduced a new line of trade show furnishings. We think this line can help you outfit your regional shows in the following ways:

- An attractive line of "one-person" set up 8x10 modular booths requires very little outside labor.
- The latest crating systems offer durable and inexpensive shipping protection.
- A roll-up signage provides large graphic impact with ease-of-use transport.

A new brochure is enclosed for further information. I plan to phone you within the month to see if you'll give us that second chance.

Sincerely,

Uninterested Customer (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear JoAnn:

We've missed your business. In reviewing our accounts, we've noticed that no one from your organization has placed an order in almost four months.

Frankly, we're concerned. Have you moved? Changed the name of your organization? Found that you no longer have need of our products? Certainly, we hope the latter is not the case.

Whatever the reason we've not shipped you any Gelco products lately, we've enclosed a new catalog in hopes of enticing you to place another order.

Just let us know how we can help you by calling 1-800-555-9754.

Cordially,

Uninterested Customer (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Browne:

We haven't talked in a while. For the past three years, I've enjoyed those opportunities—about two or three times a year—to sit down and discuss with you your ideas for new employee benefit packages and then work with you in implementing them.

But looking back over my calendar, I notice that it has been quite some time since we've worked with you. From other sources, we know that your firm is still growing and expanding into new markets, and we congratulate you on your continued success.

Have you had any difficulty in administering the compensation packages we've designed? If so, please call me collect (409-234-5532), and I'll continue to work with you on any necessary changes. We've missed working with you lately, and we want you to know that we value the opportunity to see that you have been thoroughly satisfied with our past help.

We have some new market research available around which we've designed new early-retirement packages. I'd very much appreciate the opportunity to discuss how we can work together again on your employee benefits.

Cordially,

Uninterested Customer (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Thomas:

It has been a while since we last talked about your plans for updating your home entertainment center. Therefore, we've taken the liberty of enclosing a recent brochure that will introduce our new 5-disk CD player, laserdisc player, and all-in-one remote control.

Because of your interest in earlier systems, I thought you might want to see our latest HomeSound System. It has the capacity to:

- Schedule your CD player by time, disc, and track using the "Home DJ" scheduling system.
- Play laserdiscs with full quadrasonic sound.

We encourage you to look into HomeSound Inc.'s products and services again. I'll be happy to set an appointment to meet with you in person or by phone so that we can bring each other up to date and see how well we can fill your needs.

Please come by our store for a demonstration. I look forward to hearing from you soon.

Sincerely,

Uninterested Customer (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Thompson:

We have some catching up to do! The enclosed brochure describes our expanded services and products.

Our primary objective continues to be improving the effectiveness of our client organizations by increasing their employees' ability to provide excellent customer service. In addition to our customer service seminars, we offer programs in these related areas: persuasive speaking, conflict resolution, and time management.

Specifically, we provide:

- Three-day seminars
- Extensive workbooks (excellent references long after the seminar)
- Motivational tapes

We have valued your past business and would love to hear from you with questions about the products and services in our latest brochure. I've scribbled a few notes in the margins on the new services that I think would most interest you.

Sincerely,

Mutual Interest/Relationship Building: Guidelines

- ▶ **Mention the reason you're writing—useful information, a helpful idea or suggestion, or other shared interest.**
- ▶ **Avoid making this sound like a sales letter.**
- ▶ **Choose a conversational, “chatty” tone. Remember that the purpose of this correspondence is to put a human face on your company and make your customer more comfortable in dealing with you. Allow some of your personality to show through.**
- ▶ **Be brief.**

Mutual Interest/Relationship Building (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Marvin,

I have just received a cable from our branch office in Tokyo informing me of your intent to open a Farfield International office in Japan. As I'm sure you realize, culture shock can be a problem for those employees transferring from the states. If there's anything I or my staff can do personally to make the move into the Japanese markets easier for you, please call on me.

As soon as vacationers return to work and get settled in again, I am hoping to get to Fort Worth to visit your new headquarters.

Best regards,

Mutual Interest/Relationship Building (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Jerry:

This is just a note to let you know how much we appreciate your September 21 letter with the “barebones” information about workers’ compensation. The auditors are looking at organizations such as ours with increased scrutiny and the information you have furnished us will be most helpful.

We greatly value our long and productive relationship. We are proud of what you and your staff have accomplished and wish you continued success.

Sincerely,

Mutual Interest/Relationship Building (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Dillan:

Thank you for inviting me to attend the October 31 meeting to answer questions from your managers. Learning of Vitacore's long-range goals was interesting and informative. With the aggressive approach your company has followed in the past and your commitment to maintain a state-of-the-art operation, Vitacore will certainly continue to be one of the top organizations in the country. To work with such an outstanding leader is professionally very rewarding for me.

Dillan, it is my intent to do everything possible to help you reach your stated goals. As you mentioned at the meeting, one way I can help is to arrange an evaluation of your equipment by one of our technicians, and I'm proceeding with plans to do just that. Jane will be meeting with Roger to identify opportunities for improving your facilities and outline approaches to upgrading at a low cost.

Please let me know when I can be of further help to you. I plan to continue to work closely with you and your managers on this project.

Sincerely,

Mutual Interest/Relationship Building (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Don:

Bill Gardner, president of United Forrester-Smith, and I are planning a trip to New York the week of October 7. He will just have arrived from London. Perhaps we can get together with you while there and discuss some of our international activities, and you can tell us some of your latest adventures in Latin America. Surely there's mutual interest somewhere among all these travel and war stories.

The choice of days is yours. I'll phone when we get to the hotel.

Thanks,

Mutual Interest/Relationship Building (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Sal:

The attached summary sheet highlights the activities that our companies have participated in together at Pharmacorp during the past year. Our objective is to provide you with a better understanding of how our products and services make a difference at Pharmacorp. Our expertise encompasses a wide range of activities including our role as liaison with the FDA as well as detailed planning for new trends in the industry.

Our goal is to be an active partner in helping you improve operations and service to your customers. Specifically, we think we have made measurable contributions in securing the FDA approval of Zytonol.

We continue to be committed to providing you with quality service at the lowest overall cost. We hope that you will continue to involve us in helping you plan for any challenges you may face. We have enjoyed working with you in 20– and anticipate more such rewarding opportunities in the upcoming year.

Sincerely,

Mutual Interest/Relationship Building (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear John:

Attached are the tabulations covering the last big Harris County overpass. I thought this might be of interest to you because it gives you an idea of the “going” prices.

After this job is well under way, maybe we should go out and visit with the contractors to give you a better idea of how these structures are being built on Texas freeways. See you soon.

Regards,

Invitation to Event of Mutual Interest (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Metevrieves:

We are hosting an open-house on May 6 for members of the NTSA. If you can join us on July 8 from 3:00 p.m. to 5:00 p.m., we think you'll find ample opportunity to discuss common strategies and problems among your colleagues in the industry.

The entire time will be unstructured. During the prerequisite "have a drink and some refreshments" time, we think all of you will enjoy a chance to put names with faces, exchange business cards, and share leads (and possibly even a few headaches!).

We're looking forward to having you and about 100 of your friends join us.

Cordially,

Invitation to Event of Mutual Interest (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Berkeley:

Stryson Associates is pleased to host the breakfast for the April 3 meeting for the Business Women's Association.

Who: Women executives and entrepreneurs from the Dallas-Fort Worth Metroplex

What: Breakfast, conversation, and a discussion of public relations by Jane Holson, president of Holson Media Consultants

When: Tuesday, April 3, at 7:00 a.m.

Where: Stryson Associates, in the Plaza of the Americas Building, 307 Commerce Street

Please bring plenty of business cards to share with new contacts. We look forward to having you visit our facility and join us for breakfast and an informative session.

See you soon,

Open-House Invitation: Guidelines and Alternate Phrases

▶ **Extend the invitation, including date, time, place, and purpose.**

We want to invite you to an open house at our new location, 4729 Westway Drive.

As our supplier, we want to invite you to join us for an open house at our 8792 Barrymore branch office.

You are important to us—your business, your opinions, and your needs. Would you be our guest at a May 20 open house (3489 Riverway Two) where our researchers and engineers can “mix and mingle” with you and other customers about your ideas and needs?

▶ **Give details on the schedule and any planned activities.**

We have planned a guided tour of the grounds at 2:00 p.m.

Bob Pretone will be giving a 30-minute briefing on new equipment under development. His briefing will be repeated three times during the afternoon (2:15, 4:00; 4:45) to allow all our guests to hear about our plans to meet their future needs.

We’ll have our latest models available for your hands-on experience in....

Our sales representatives will be available to answer your questions about....

A formal time of tea and cakes will be followed by a briefing on....

▶ **State whether another representative (associate, spouse, or another guest) is invited to attend if the reader cannot be present.**

If you can’t attend yourself, load a colleague’s pockets with business cards and send him or her along in your place.

Bring a guest or two to enjoy the informal networking.

We are asking that only company CEOs attend in order to allow time to share concerns at the highest level of the organization.

▶ **Ask for a response to a designated person by a certain date; if no response is necessary, say so.**

Please RSVP to Steve Whitaker by noon on December 10.

Please let us know if you'll be able to join us for this sharing time. We need your response by March 23 (Margaret Jones, ext. 4782) to make sure we have plenty of briefing packets for all our guests.

There is no need to let us know if you'll be dropping by. If you have the time, we have food, facilities, and fun.

Invitation to Open House (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Metevrieves:

We are hosting an open-house on May 6 for members of the NTSA. If you can join us on July 8 from 3:00 p.m. to 5:00 p.m., we think you'll find ample opportunity to discuss common strategies and problems among your colleagues in the industry.

The entire time will be unstructured. During the prerequisite "have a drink and some refreshments" time, we think all of you will enjoy a chance to put names with faces, exchange business cards, and share leads (and possibly even a few headaches!).

We're looking forward to having you and about 100 of your friends join us.

Cordially,

Invitation to Open House (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Berkeley:

Stryson Associates is pleased to host the breakfast for the April 3 meeting for the Business Women's Association.

Who: Women executives and entrepreneurs from the Dallas-Fort Worth Metroplex

What: Breakfast, conversation, and a discussion of public relations by Jane Holson, president of Holson Media Consultants

When: Tuesday, April 3, at 7:00 a.m.

Where: Stryson Associates, in the Plaza of the Americas Building, 307 Commerce Street

Please bring plenty of business cards to share with new contacts. We look forward to having you visit our facility and join us for breakfast and an informative session.

See you soon,

Invitation to Open House (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Chris:

You have been instrumental in our phenomenal growth over the past few years, and we want to say thank you.

Would you please be our guest at an open house from 3:00 p.m. to 5:00 p.m. on Tuesday, October 23? We've planned to have demos of Avoir, our new off-line video-editing suite, for a hands-on opportunity for you to see how it performs. Our design engineers will also be available to answer questions about how Avoir can help you meet your specific goals. Likewise, your own experience with other video-editing packages is valuable input to us.

If your schedule is rather predictable, we will appreciate an R.S.V.P. to Joe Grisham, 555-8223, ext. 344, by October 18. Or, if you can't plan that far in advance and you find time at the last minute to drop by, don't worry about the R.S.V.P. Simply come join us.

We hope to see you on October 23.

Cordially,

Presentation of Gifts: Guidelines and Alternate Phrases

- ▶ **Describe the gift you are sending.**
- ▶ **Use a modest, appreciative tone. Present the gift as a way of thanking your reader for his/her business. If the gift is being sent in response to a request, thank the reader for his/her interest and don't imply that the gift creates any obligation.**

You have been such a valued customer. We are pleased to send you this small gift.

Thank you for your interest in the PaceRight training log. We can think of no better way to learn about our software than to use it. So, we are sending you this free demo version.

- ▶ **Be brief.**

Presentation of Gifts (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mrs. Ehnes:

Your AutoTex Tradeshow Prep Checklist is enclosed. You may want to review it and note the items applicable to your specific situation. Because so many of our clients have called about drayage and labor, we thought such a checklist would be helpful to you in planning your regional shows for the new year.

Since most of us will be meeting in the near future, we can discuss any questions you have at that time.

Sincerely,

Presentation of Gifts (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ted:

Thank you for your recent letter expressing an interest in Doppler momentos from our motivational collection. We are enclosing ten posters at no charge.

If you'd like to purchase others, they are available at \$___ when you write to:

Doppler Graphics
230 East Merchant Street
Boston, Massachusetts 55555

Simply ask for Doppler PowerPosters, and I'm sure you'll be able to complete your collection. Let us know if we can help in any other way.

Sincerely,

Presentation of Gifts (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Dina:

Thank you for being one of our best customers; we're forwarding to you a little present for the holidays—a porcelain bank. We think a bank is perfect for someone like you who knows the value of a dollar.

Please remember how much we appreciate your business whenever you need printing services.

Happy holidays,

Presentation of Gifts (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Vladamir:

We are delighted to send you one of our executive desk calendars. As you know, it was reserved in your name and is sent to you exclusively as a Babbitt's client.

The calendar provides a convenient and attractive way to organize appointments. Other features include:

- A date view by day, week, or month
- A section for personal numbers or business contacts
- A detachable note section

This gift is our small way of saying thank you for your business through the years.

Sincerely,

Recognition of Customer Achievement: Guidelines and Alternate Phrases

- ▶ **Mention the event, achievement, or honor immediately. Don't keep the reader in suspense about your reason for writing.**
- ▶ **Be specific in your praise. Exaggeration and vague generalities sound gushy and insincere. Let the reader know you understand the time, effort, expertise, persistence, creativity, or whatever was necessary to accomplish the achievement. Elaborating on these specifics gives the reader time to "enjoy" your attention.**

This award simply recognizes what those of us who work with your company have already figured out—you make a fine product.

The new job is one that I think will allow you to use your talents fully—your leadership abilities, your eye for opportunity and new trends, and the articulate way you express yourself.

Publication in such a prestigious magazine certainly underscores the value of your ideas for all of your industry leaders.

- ▶ **Be informal and personal without being too familiar (unless you know the reader very, very well).**
- ▶ **Express enthusiasm. Don't make your letter sound like the typical form letter that duty dictates. Promptness itself indicates an eagerness to recognize the occasion or achievement.**

Congratulations on your new position as vice chairman! Nimitz is a great company, and I'm glad to see that they recognize their star players.

- ▶ **Be sincere. An effusive display of flattery makes even a great accomplishment seem small or undeserving of your notice.**

Recognition of Customer Achievement (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Lorraine:

I just finished reviewing the current issue of *LAN Monthly* and read with interest your article entitled “Administering LANs in the Age of Internet”—very timely. I made copies immediately to distribute in our department and plan to use your ideas as a resource when I talk with our staff next week about trends in the computer network field.

I’m pleased to know of your publishing success.

Sincerely,

Recognition of Customer Achievement (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Dwayne:

Now that you're on your way to stardom, I hope you will remember those of us back here in San Diego who are your talent brokers and most ardent fans.

Seriously, I was pleased to see you and your company as a feature in the March issue of *Heavy Industry News*. It sounds as though you've had a wonderfully successful decade, and I know that you look forward to even greater growth as the economy improves.

As far as we're concerned, this recognition of your experience and expertise is well deserved. Congratulations.

Cordially,

Recognition of Customer Achievement (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Cyndi:

I must admit that I was not at all surprised to see that you had been awarded the highest honor in the landscaping industry: the Madison Award.

Having worked with your organization over the last several years, I've admired the quality of work and attention to detail you've brought to the landscaping arena. It's always an honor to be recognized among one's peers around the nation for such efforts.

We at Reynolds Brothers congratulate you and wish you continued success.

Sincerely,

Recognition of Customer Achievement (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Joseph:

We congratulate you on your recent promotion to senior vice president at Vandelay Industries. This new position will present opportunities that will challenge your experience of the past 15 years in the field. I'm confident, however, that the extraordinary expertise you have developed over the years will more than meet that challenge.

We hope you'll continue to keep Finn Inc. an integral part of your plans for growth. Best wishes for a successful future as senior vice president of Vandelay.

Sincerely,

PART 4

**SALES &
MARKETING
MANAGEMENT**

90 READY-TO-USE LETTERS

Announcing a Promotion or Transfer to Your Staff: Guidelines and Alternate Phrases

- ▶ **Announce the promotion or transfer, including new position title, effective date, and reporting line.**

We are pleased to announce....

Jack Jordan will be assuming the new position of vice president of marketing, effective May 1, reporting directly to Michael Crock. We are so pleased to have him take the reins of leadership for our Eastern division.

We are pleased to welcome Harvey Malone to the position of Regional Manager, effective October 15. Harvey will be reporting to the vice president of operations here in Atlanta.

- ▶ **Briefly outline the new responsibilities so that others in the department will know how their tasks relate to those of the promoted employee.**
- ▶ **Highlight some of the past accomplishments that led to the promotion or transfer.**

As you may remember, Marla has led our team to record sales on the Fusia products for the last two years.

Harold comes to us from United Ferris, where he held several sales management positions.

Carol led the effort to restructure our European division, a turnaround that within three years resulted in a 428 percent increase in gross revenue.

My personal regards to Jackie as she assumes this position in the style of her many past successes.

Myrl has had many successes. In her first year here, she was instrumental in.... During the last two years, she has successfully completed....

- ▶ **Show confidence and pride in the announcement, as if bestowing a reward for work well done. Your announcement may serve as motivation for other employees.**

We are so pleased to provide these opportunities for advancement for such high achievers as Chris.

We look forward to great things from Sylvia in this new job. She is an idea waiting to happen.

Our eyes are on Phil. We're expecting even more successes in this new position.

We have every confidence that Joanna will do great things in this capacity.

Announcement of Promotion/Transfer

Memorandum

TO:

FROM:

DATE:

SUBJECT: New Division Managers

Effective July 1, 20–, I'm pleased to announce that the following people will be recognized as Division Managers of the four regions:

Name	Location
Jonathan Lincoln	Northern Division
Lucinda Peebles	Southern Division
Harry Simonton	Eastern Division
Warren McAlister	Western Division

It has been almost nine months since our group field force was organized into four districts. During this period, the vice presidents representing these regions were to have spent more and more of their time on management issues and responsibilities outside of their offices. This gradual change has been successfully accomplished.

An important part of this plan was to eventually appoint new managers in the divisions. This plan has created new management opportunities for the other sales representatives company-wide. I hope each of you will join me in congratulating these people and wishing them the very best.

Announcing a Sales Review or Report: Guidelines and Alternate Phrases

- ▶ **Announce that sales reports or reviews are required. Give the deadline for submission of the reports or provide a schedule for reviews.**

Your quarterly division sales reports are due by April 15.

Our annual review process will begin on October 15. Please have the performance reviews on your staff completed no later than October 1. Forward a copy to the division office so that the review team will have your recommendations for use during the review sessions.

In order to prepare for the annual sales meeting properly, please have your district actual sales, projections to year-end, and estimates for next year transmitted to the regional office by November 15.

- ▶ **Explain what kind of information you want included. The more specific you are in the announcement, the better prepared you can expect your staff to be in their reviews and the more focused you can expect their reports.**

Include specific information by manufacturer, product, and model. Be sure to separate regular sales from those due to special promotions, price reductions, or closeouts.

Remember to describe progress made since the last review toward achievement of the mutually agreed upon objectives and gross sales.

We want you to carefully evaluate the total requirements of the planned expansion and adequately project just when to add new sales personnel, equipment, and support staff.

- ▶ **Stress the importance of these reviews. Provide a brief explanation of their importance in sales strategies, personnel decisions, or other facets of planning.**

This information is critical to our evaluation of the overall sales projections and factory production schedules for next year.

As you know, our goal of increasing annual sales by 20 percent requires additional staff. We want to be sure that we have adequately planned for this expansion with a careful and realistic evaluation of district-by-district expectations.

As the second stage of our reorganization begins, we need to follow the overall plan while making the modifications that have become obvious during the first stage.

Annual reviews can be important motivational opportunities for you and your staff. Determining and agreeing upon realistic goals is one part of the process that will empower all involved and nurture the team spirit that has served us so well.

Announcing a Sales Review or Report

Memorandum

TO:

FROM:

DATE:

SUBJECT: Year-End Sales Reviews

The year-end is fast approaching. We need to understand fully how we are going to wrap up the year and what we need to do to position ourselves for the upcoming year's opportunities.

To this end, Charles Barstow and I will be holding sales reviews with each of you according to the following schedule:

Name	Location	Date
Bob Wilson	Dallas	December 10
Harold Wood	Fort Worth	December 11
Marilyn Archer	Amarillo	December 12
Peter Azfour	Albuquerque	December 13
Jean-Michel Farrar	Santa Fe	December 14

All sales reps and specialists with a budget are expected to participate. They are also expected to have completed their resource books (organized by product segment and customer) with plans that show how they will make their quotas. Please keep in mind that their plans should be realistic, but challenging and measurable.

In addition to this individual preparation, an overall sales plan that addresses key industries and segments specific to your team should be incorporated in your overall marketing plan.

If I can be of assistance in preparing these plans, I am as close as your telephone.

Regards,

Announcing a Sales Review or Report (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Timely Submission of Weekly Sales Reports

Timely review and documentation of the weekly outstanding quota listing is essential to your continued success at Essential Systems and to our overall success as a company.

Please prepare this report on a regular basis and forward a copy to me by Tuesday of each week.

Without your cooperation, I cannot have accurate and timely information available for Richard Wayne. Your regular attention to these reports will result in fewer interruptions of your work schedule as each month progresses.

Thanks for your cooperation.

Announcing a Staff Meeting: Guidelines and Alternate Phrases

- ▶ **State when you have scheduled the meeting. Other brief details such as where, what time, and why can usually be given in one “message” statement.**

You are asked to attend the next monthly managers meeting (Tuesday, August 9, 9:00 a.m., conference room C) to give your input on the....

- ▶ **Be clear about whether meeting attendance is required or optional.**
- ▶ **Ask for confirmation of attendance so that if key people will be unable to attend or if necessary information is unavailable, you can reschedule. It is better to cancel than conduct meaningless meetings.**

Please call to confirm that you will attend.

Please phone if you will not be attending.

Attendance is required.

If you cannot attend, let me know as soon as possible so that we may reschedule the meeting, if necessary, to have a majority present.

Let me know if you will be attending personally or if you plan to send a colleague in your place.

If you cannot attend, please designate someone from your staff to attend.

All interested parties are invited to attend.

We do not need a confirmation of your attendance, but we hope to see you there.

We need a completed registration form in order for you to attend the meeting.

- ▶ **Include the meeting agenda in question form so that attendees know specifically which direction their thought, planning, and comments should take. Generally stated topics such as “technical problems” give few clues for attendees to come prepared with data, questions, or comments. Also, include time allocations for agenda items. Although these cannot always be adhered to, stated guidelines help attendees know the depth of discussion expected and later keep the meeting from getting bogged down in insignificant detail. Time limits and the order of**

agenda will also allow those whose presence is not required for the entire meeting to come late or leave early.

- ▶ **Tell attendees what preparation they should make or what they should bring to the meeting.**

Please come to the meeting prepared to brief us on....

Please have the July sales figures with you at the meeting.

We ask that you review the enclosed report before the meeting.

You need to read the operator manual before you report to the class.

Please make every effort to talk with several sales managers from your district to gather their opinions about this issue.

Please review the enclosed packet of materials.

Please bring a list of your accounts with service problems.

We ask that you read the first two chapters in the enclosed booklet before attending the meeting.

Please return the enclosed presidential ballot before the meeting date.

Announcing Staff Meeting

Memorandum

TO:

FROM:

DATE:

SUBJECT: Strategy Meeting

Our next strategy meeting is scheduled for January 3 from 8:00 a.m. to 10:00 a.m. in the Savannah Room of the Portland office. Our objective is to agree on steps, materials, and delivery schedules for projects remaining this year. If you have the responsibility for one of these activities, please come prepared to accomplish this objective. If you cannot finalize your plans by this upcoming meeting, please be prepared with a tentative schedule and any concerns about your needs. We will discuss:

- Completion steps for the Atlas project
- Material requisitions—all projects
- Scheduled site deliveries—all projects

Our previous meetings have been successful due to substantial effort and planning; such attention to detail pays off. Thank you for taking the necessary time.

If I can help you in your preparation, please call me at 215-555-9087.

Change in Commission Structure, Territory, Policy or Procedure: Guidelines and Alternate Phrases

- ▶ **Give a general overview of the policy or benefit up front. Focus on key benefits to employees in the policy and the positive reason for changes.**

This policy should help us assist you in....

This change has become necessary for increased accuracy in reporting your travel expenses.

- ▶ **We are pleased to tell you that you can directly access information about your retirement benefits. Arrangements have been made with....**
- ▶ **Give clear instructions for following the policy or procedure. Include effective dates.**
- ▶ **Don't state the policy in a negative format and tone. As much as possible, make policy sound like guidelines and benefits rather than restrictions and penalties.**
- ▶ **Sprinkle lengthy policy statements with informative headings and use lists where possible. Rarely will an employee need to read the entire statement; he/she should be able to immediately pinpoint eligibility requirements, benefits, limitations, and so forth.**
- ▶ **In a memo, use the subject line to distinguish between a new or revised policy or procedure and an already established one. Without such a subject-line clue, the reader often skips reading the memo, thinking he is already informed about the stated procedure.**
- ▶ **Point out any major changes in existing policy.**

This is a marked departure from previously existing policy in that....

Notice that this policy differs in....

Primarily, there are two changes to be aware of:...

- ▶ **Keep the tone instructive rather than restrictive.**

If I can help in implementing the system or explaining the reasons behind these changes, let me know.

- ▶ **Provide a way for employees to have their questions answered and their concerns addressed—a hotline, a brochure, a forum meeting, and/or a contact name and number.**

For your convenience, we have set up a hotline to give you immediate help in preparing the necessary paperwork.

You are invited to an open forum discussion on the issues that I'm sure this change will generate.

Please feel free to call our corporate headquarters with questions (ext. 3345, ask for Barbara Neitmet).

We welcome your questions—your complete understanding is essential to the smooth implementation of this new policy.

If you have concerns or otherwise feel that your needs have not been addressed in the enclosed packet of information, please call us. We can arrange to have someone visit your location and conduct short, informal sessions to explain the policy.

- ▶ **Motivate readers to even greater success by expressing appreciation for their cooperation with these policies and their contributions to the organization.**

Thank you for your efforts in making this a successful year for Baxton, Inc.

Without your efforts, we could have never realized the profit we've seen during the last six months.

I want to express my appreciation to each of you for your efforts on behalf of the company and our department.

Let's keep those profits growing.

Thank you for your loyalty and extra efforts.

You have gone above the call of duty, and I thank you.

We think you'll agree that these policies benefit the company as a whole.

We know you'll agree that it is in your best interest to make these changes.

When the company benefits, eventually we all reap the rewards in bonuses, raises, promotions, and additional jobs. Thank you for expending this extra effort to increase our bottom line.

Thank you for your usual excellent consideration.

We appreciate your patience in this time of transition.

As always, your cooperation is essential in handling these details. Thank you.

Thank you for helping us help you.

We value your support in this temporary change of plans.

We hope this explanation will address most of your concerns.

We hope this communication will clarify any questions the new policy raises.

Change in Commission Structure/Territory/Policy/Procedure (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Your New Position with the Atlanta Office

Jim, I want to follow up on our previous discussion and further clarify your new duties.

To properly coordinate and support the efforts expected from Mike Selman as manager, you will now report directly to him. I realize that you two work very well together and that you should have no problems.

The agreements made with you regarding existing accounts and company supervisors should serve as a reasonable guide to what each of your roles should be. If there are situations that are in question or seem not to be addressed in a previous agreement, I expect you and Mike to come to mutually acceptable solutions. If there are disagreements, I will intervene.

Regarding Brentwood Inc., someone other than you will begin servicing the account. This is no reflection on the degree or quality of service that you have provided, but rather the result of requests by Brentwood officials to minimize their travel reimbursement expenses. This request is one we can accommodate with minimal disruption or expense.

I expect the planning process that each regional office will go through during the next few weeks will give you and Mike an opportunity to discuss your new working relationship. If either of you have comments, issues, or plans we all need to discuss, please let me know.

Sincerely,

Change in Commission Structure/Territory/Policy/Procedure (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Territory Change for the Cleveland Office

The following is our 20– game plan for the Midwest area:

- **Territory** – Cleveland will be recognized as a sales office with an identical territory to the Cincinnati regional office. The physical presence here will cover our bases for retail outlets from Chicago to Pittsburgh and maintain Oregon Outdoors’ name recognition there.

Because of the commonality of territory, the profitability of the two offices will be judged together. All bonuses from June 4 forward will be payable to reps of both areas. This plan gives them an equal stake in the risks and rewards associated with that region’s business.

- **Staffing** – Peter Ludic will be considered an Oregon Outdoors employee out of the Cincinnati office, but the majority of his time and activity will be in the Cleveland office. Headcounts in both offices will remain the same as they are currently.

Thanks for a great year!

Change in Commission Structure/Territory/Policy/Procedure (Example 3)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Reduction of Staff and Filling Open Positions in the Sanford Chips Division

With four months left in our fiscal year, there remain significant staff-reduction quotas to meet. Enclosed are hiring guidelines to help us meet this objective. As you know, Potato Tasties volunteered to reduce its staffing head count by 25 percent in an effort to meet Sanford Chips objectives. For this division, that meant going from 64 to 48 employees.

Many of you have reduced your office staff by one or more people, and I commend you for managing to “do more with less.” However, our higher-than-anticipated new business production and persistence have thwarted other divisions’ efforts to downsize.

Over the next week, the Sanford Chips Division management will re-evaluate each of the outstanding unfilled positions. Since we are at a zero-sum game, every subsequent addition to staff must be offset by a reduction through position elimination or attrition.

The attached hiring policies may seem overly bureaucratic, but they are the only way we can manage a decentralized department to a specific staffing level. Thank you for your cooperation in following these guidelines.

Change in Commission Structure/Territory/Policy/Procedure (Example 4)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Change in Commission Structure

Our 20- losses caused us to realize that our commission schedules were truly contingent on Biddley Inc. making profits. We have now taken time to read our contracts! Upon closer review of our present structure, we have also learned that our 20- objectives of 15 percent will generate a factor of 0! We knew this possibility would cause a lot of financial problems for our entire sales organization!

Therefore, the regional vice presidents began discussions of alternative schedules. We soon realized that the most powerful means to gain support on the issue was to show results, and we have done that. Our new business will surpass \$____. We've sold high rate increases, we've sold productivity, and we've held together.

In light of these realizations, projections, and successes, we will be making changes to your commission schedules. (See the attached scale.)

Simply said, if Biddley Inc. makes its numbers, you do very well. There is a real possibility that improved experience and continued expense controls can generate even better commissions for you during the upcoming period.

If you have questions regarding these changes, please call your regional vice president or me. Thanks for the results.

Cordially,

Change in Commission Structure/Territory/Policy/Procedure (Example 5)

Memorandum

TO:

FROM:

DATE:

SUBJECT: New Procedure for Determining Commissions on Foreign Sales

To determine the commissions on a product quoted as a landed-project price, our new procedure is to deduct freight and duty to arrive at FOB factory price. This price then is the basis for the standard commission on foreign sales.

The following illustrates this computation:

Foreign sale price	\$4750
Less freight	525
Less duty	<u>475</u>
= FOB factory price	\$3750

The standard commission rate will apply to the \$3750 FOB factory price not the foreign sale price.

We hope this explanation and example will clarify any questions regarding commissions on foreign sales.

Regards,

Change in Commission Structure/Territory/Policy/Procedure (Example 6)

Memorandum

TO:

FROM:

DATE:

SUBJECT: New Credit Card Programs

Effective February 1, you will be able to accept bank cards and all major credit cards, including Voyage, First Card, and Service Express. By accepting these cards, in addition to our own Preferred cards, you can provide your customers one of the strongest credit-card programs in the industry.

In order to offer this program to you, however, we will have to assess a three percent processing fee on all bank-card invoices remitted and billed on your monthly statement. You will receive a monthly invoice detailing the charge by site number. Your acceptance of these bank cards will acknowledge your agreement to the regulations set forth in the revised credit-card guide and to the processing fee.

The benefits of accepting credit cards other than our own are three-fold:

- Convenience of processing
- Opportunity to attract customers not carrying our card
- Larger purchases typically made by credit-card users

You will soon receive processing and authorization instructions from the credit-card center. Please review these with all your employees and dealers so they become familiar with the new procedures. Because our credit-card processing equipment can distinguish among the different cards, there is no need for you to separate the invoices.

If you have any questions, please contact your sales representative.

Cordially,

**Change in Commission Structure/Territory/Policy/Procedure
(Example 7)**

Memorandum

TO:

FROM:

DATE:

SUBJECT: Distribution in Unassigned Counties in West Tennessee

After much review, I have decided on the following distribution of unassigned counties to existing Swash Company distributors in West Tennessee:

- Madison County
- Shelby County
- Henderson County
- Pinson County

New contracts adding the above counties to the existing distributor agreements will have to be prepared in the Jackson office.

Please contact your respective distributors to let them know of the changes. I expect that the existing distributors will start immediately to develop business in these new areas, and consequently, we'll all profit. (A map of the region is attached.)

Discontinuing Your Product Line with Distributors: Guidelines and Alternate Phrases

- ▶ **Tell the reader about cancellation of the product or service, outlining your reasons for the decision.**

This cancellation is due to the incorporation of this service into our new three-year warranty.

We canceled the P315 amplifier. Our new P625 amplifier is more powerful, has a wider array of features, and is priced 20 percent lower due to improved manufacturing techniques.

We regret that we are unable to continue to offer our De-Contam services in Kansas due to the recent passage of House Bill #4557 by your state legislature.

The extreme difficulty in obtaining the natural raw herbs and other materials in sufficient quantity and quality to meet our standards has necessitated the cancellation of the Easybreathe inhaler.

- ▶ **Thank the reader for his past business and wish well in future business. You may use this distributor in the future.**

Discontinuing Your Product Line

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Pliszka:

Effective July 1, Roland Cement will discontinue the sale of FastSet at all retail outlets in Montana.

Therefore, with mixed emotions, we must end our partnership with Capital Paving. Quite simply, we've found that the recent state legislation prohibiting our special additive prevents marketing FastSet in Montana.

Thank you for your past confidence in our products, your excellent payment record, and your fine cooperation with all our various promotions.

We wish you continued success with your remaining lines.

Sincerely,

Encouraging Distributors to Increase Volume: Guidelines and Alternate Phrases

- ▶ **Praise the reader's efforts in distributing your product. Keep the tone upbeat.**

Thank you for being our front line.

You are part of the team that has made Modern Plastics a major player in the plastic laminate market. We value the relationship that has developed over the last five years and look forward to the future.

- ▶ **Generate enthusiasm about your products. Show that you are backing your products with thoughtful marketing efforts. Ask for input on your marketing ideas from your reader.**

Enclosed are cut sheets from the coming quarter advertising plan. We are shipping sales posters for your store windows and other display materials that continue this year's theme "More for Less."

Let us know when you would like for our regional sales team to come in and hold a new ideas promotional meeting for your staff. We need about two weeks notice to schedule the visit.

- ▶ **Give the reader an idea of what kind of volume you are expecting distributors to keep.**

We would like to see your volume increase by 8 percent next year.

Based on last quarter, we are projecting \$___ for your dealership for the upcoming period.

- ▶ **Express confidence in your reader's ability to meet your volume goals.**

Bertram Sailboats has never missed a sales goal. We depend upon you to keep our auxiliary engines foremost in your customer's mind and we have the utmost confidence in your sales staff.

Keep up the good work.

Encouraging Distributors to Increase Volume

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Campbell:

Congratulations on your progress in getting Speedy Gro on the shelves and available for eager customers in the Rogers area. I am excited about the response you are receiving.

How about our getting together to discuss all of the products and your immediate plans to increase traffic in your store? Can you give me a call next week to arrange a meeting time? I would find it helpful to know the following:

- What are your promotion plans in general?
- What promotion plans require use of our graphics and print materials?
- How will our inventory be affected by your promotion plans?

I would also like for us to come up with some specific plans for catalog copy and promotional literature. As you and I both know, products—no matter how excellent—don't sell themselves. The more specifically we plan, the more spectacular the results.

Our policy is to encourage all distributors to maintain a volume of \$200,000 annually. We are very ready to talk specifically about how we can assist you in maintaining—and even exceeding—this volume in 20—.

Cordially,

Introducing Product Line to Distributors: Guidelines and Alternate Phrases

- ▶ **Introduce the product immediately, explaining how it differs from whatever is already available: Is it less expensive, easier to use, more accurate, or safer? State exactly what its significance is.**

The new gaskets promise longer life at a lower price. This alone should interest your customers, but you can also offer them the benefit of purchasing the new multi-pack with a dozen of each of the most popular sizes.

Our new postage scale is easier to sell because it is smaller, easier to use, and less expensive to operate.

We have redesigned the TorqueDrill to conform with the new UL safety standards for power tools. We are ahead of all the competing brands because the standards do not require compliance until next year.

- ▶ **Explain how carrying this new product will benefit the distributor. For example, mention if the product will provide higher profit margins or target a larger market.**

Your order for the new distributor pack will enable you to have an amplifier at every popular price point. There is a model for every need and every budget.

Our market research predicts that this model will quickly surpass all the competition due to the increase in performance, reduction in size, and competitive pricing. Call now for your initial supply.

- ▶ **Provide a way for the reader to get more information, or arrange for a meeting or phone call.**

If you would like a demonstration on the new SP500 generator, just call Jim Stone at 512-333-8999. He will schedule a day-long demonstration on your parking lot, provide mailers for your customer list, send posters for your store displays, suggest ad copy, and arrange to cater refreshments for the event.

Introducing Product Line to Distributors

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Engelmann:

ABC Plastics understands that the wholesale distributors who will thrive in today's marketplace are those who can solve the complex riddle of:

- Keeping inventory costs and levels under control
- Providing quality customer service
- Pricing products competitively
- Controlling cash flow

ABC Plastics is in the business of helping to solve this mystery for distributors.

Specifically, we want to introduce our two new lines of industrial trash containers and clean sweepers. (Brochures are attached.) In several published studies, these product lines have consistently outperformed other brands in three ways:

- ABC's pricing typically undercuts competitors, yet still provides a large margin of profit for distributors.
- ABC's products are manufactured for durability, and have earned end-user loyalty resulting in repeat sales.
- Our products move! Inventory typically turns over 50 percent faster than competitive products.

Our customers have saved up to 14 percent of inventory cost while improving productivity and cash flow.

I will call you next week to discuss how we can work together as partners to increase profits.

Sincerely,

Offering Incentive Award to Distributors: Guidelines and Alternate Phrases

▶ **Announce the incentive award offer immediately.**

For the next six weeks, you may order any of our stocked items and receive free shipping.

We are pleased to offer a new sales incentive plan that offers free merchandise, free trips, and a special grand prize.

As a reward for your past support of our products, we are offering you a 10 percent discount on your next order.

If your next order totals more than \$____, we will allow you 60 days to pay our invoice before incurring a finance charge.

▶ **Give all the details about the award program, including effective dates, criteria for earning the award, and time frames.**

This is the easiest promotion we have ever offered. We will keep all the records based on your purchase orders.

The promotion begins on March 1 and runs through the end of May. We will award all prizes at the June sales conference.

All purchases since the first of the year will count toward meeting the award levels.

▶ **Thank the reader for his or her association with your company. Present the incentive award as a symbol of your appreciation.**

You were a major factor in our phenomenal growth last year. Simply stated, we couldn't have done it without you, and this is our way of expressing our appreciation.

Thank you for your efforts on our behalf. We hope this offer will encourage you to promote our products even more enthusiastically.

▶ **If you intend the letter to act as a legal amendment to an existing contract, provide a signature line for the reader.**

If you are as eager to join in this sales contest as we think you will be, just sign and return one copy of the contract.

Offering Incentive Award to Distributors (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Helen:

We are pleased to announce the establishment of an Incentive Award Program for our authorized distributors in 20—. This program has been instituted to reward your distributorships for the balanced development of your market areas. The award is based on the mix of your HVAC business in key product and package categories. These categories are designed to measure objectively the scope of your product lines and their distribution into various market segments.

The award will be issued as a monthly credit memo to your regular product invoices. The program is effective from May 15 to the end of the year.

We hope you will agree that this is a positive step to acknowledge our appreciation for you as a distributor and to reinforce the strategies that lead to our mutual success in the marketplace.

Sincerely,

Offering Incentive Award to Distributors (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear David:

As an amendment to our distributor contract dated February 11, ATV Accessories, Inc. is pleased to offer an incentive program for our newest product, the SunSeat Saver.

The incentive program will include a bonus credit system dependent upon volume of product sold.

Details of the incentive program include:

- A per distributor quota of 1100 units per month for April through August
- A three-day cruise incentive for regional managers with the highest sales overall
- Bonus points when SunSeat Saver is bundled with WideView Mirror

For maximum benefit from the incentive program, we encourage you to apply the bonus credits to additional SunSeat Saver inventory.

We also reserve the right to terminate the incentive program at any time without justification or obligation.

Your signature below will indicate your acceptance of the incentive program as an amendment to our contract. We appreciate your partnership and continually welcome ideas that we can implement to encourage your success.

Sincerely,

Accepted by:

(Name)

(Distributor's company)

(Position title)

Proposing to Distribute: Guidelines and Alternate Phrases

- ▶ **Introduce your company.**
- ▶ **Distinguish yourself from possible competition.**
- ▶ **Focus on how an association with your firm can benefit the reader.**
- ▶ **Outline any steps you are prepared to take to make doing business with you even easier and more profitable for the reader.**
- ▶ **Suggest the next step, such as a phone call or meeting.**

Johnson Electric believes that our newly designed capacitors will create a new level of quality in the industry and set us apart from our competitors. The UL lab has given us its highest rating and you will be able to display a notice to this effect on your entire line of laboratory equipment. I will call you early next week to set up a meeting at our labs that will clearly demonstrate the superiority of Johnson capacitors.

Proposing to Distribute

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Ballard:

We are very much impressed with your sales, training, and advertising materials used in the Dallas-Fort Worth metroplex. We have also spoken with numerous customers who are very complimentary of your products and your company in general.

Consequently, we believe that it would be wise marketing strategy to make our Little Rock center totally Practical products. While we are aware that you do not presently market your products in our state, you do have a distribution center in Memphis, just east of us. The Practical name is well known in this area, and we're confident that a totally Practical marketing complex would be a success.

We would welcome the opportunity to be named Practical's marketer for our area. If you are agreeable, we plan to build three such complexes within the next two years. We are willing to buy our products directly from you at distributor prices, or if you prefer, from the supplier of your choice.

We look forward to meeting with you and discussing our proposal to join the Practical team.

Sincerely,

Requesting Information from Distributors: Guidelines and Alternate Phrases

- ▶ **Focus immediately on the information you need.**
- ▶ **Mention the potential partnership you have in mind.**
- ▶ **Be specific about what you need, including dates, amounts, names, customer base information, shipping channels, marketing brochures, and so forth.**
- ▶ **Supply any forms, information, return envelopes, and contact names and numbers so that the reader can respond quickly and easily.**

If it's more convenient for you, please feel free to call me collect at 713-955-9525.

I've included all the necessary release papers and permission forms ready for your signature.

- ▶ **Anticipate the reader's steps in preparing the information. The more questions you can answer before they're asked, the sooner you'll get your information and determine whether to move ahead with the distributor arrangement.**
- ▶ **Thank the reader.**

Requesting Information from Distributors

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Heather:

Over the years, a number of Gourmet Gifts retail outlets have been added or lost in each of your marketing areas. In order to update our records and to ensure that the credit card program is being used most effectively, would you provide a list of each retail outlet eligible for a credit card imprinter plate, along with the following information on each outlet:

- Outlet location and phone number
- Outlet sales tax permit number
- Outlet manager

We need this information by August 1 so that each location may be verified prior to further processing. All existing imprinter plates not submitted for approval by the above date will be canceled on October 1.

Thank you for your help in providing this information as we do our best to meet our customers' expectations.

Sincerely,

Warning Distributors About Low Volume: Guidelines and Alternate Phrases

- ▶ **State the problem with the distributor's low volume up front.**
- ▶ **Remind the reader of any past discussions or correspondence in which you discussed your policy concerning distributor volume levels.**
- ▶ **If necessary, review your company discount schedule and volume goals.**

As you know, your purchases have been below the required levels all year.

Your volume is less than your projections and below our requirements.

Our original contract was quite specific as to the volume required for Class A Distributor status. As you know, we have discussed these same requirements on several occasions.

The notice you received on October 1 set forth the additional purchases you needed to make by year end. A review of your status since then finds that no essential progress has been made in reaching the required volume.

- ▶ **Don't make this letter sound like a reprimand. Show concern or simply state company policy.**
- ▶ **End by showing your confidence in the reader's ability to meet your volume goals. Extend an offer to assist your reader in whatever way you can. Remember, raising your reader's volume benefits everyone.**

Can we provide you any assistance in meeting our mutual goal?

Losing a distributor is not something we enjoy. We are more than willing to provide you with additional sales brochures, test results, or satisfied customer profiles if that will help your staff promote Midwest products. Good teamwork helps everyone on the team. Please let us know what we can do.

Is there anything we can do to help you retain your current discount structure?

Warning Distributors About Low Volume (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Miluck:

In July, Faux Walls, Inc. established a "Performance Standard" for all national distributors. This national program set our standards for maintaining the distributor discount structure:

- 30 percent for 100 units per month
- 35 percent for 150 units per month
- 40 percent for 200 units per month

We regret to notify you that unless we have shipped or have orders in-house exceeding \$___ as of December, your distributor status will be reduced to jobber status. As a jobber, the discount structure is:

- 10 percent for 25 units per month
- 15 percent for 50 units per month
- 20 percent for 75 units per month

Once your status changes to jobber, we will need a justification letter and a minimum order of \$___ (at cost) for you to be reinstated as a distributor. Major markets require a \$___ order.

Let's work together to do all we can to prevent the loss of this equipment line to your organization. How else can I help?

Sincerely,

Warning Distributors About Low Volume (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Alex:

I want to follow up our January 16 conversation in which we discussed your current volumes with Results, Inc. products.

You will have to agree, I'm sure, that the progress you've made in the last 8 months in developing your area of responsibility has not been as beneficial to either your company or ours as we all had hoped.

Although your company has undergone many internal changes these past few months that diverted your attention elsewhere, I'm sure you also realize that we need to market our products in the Atlanta area in the most profitable way.

Let's try to set up a meeting in February so that we can plan our strategy to help you maintain the required \$___ volume and 35 percent discount. Would you give me a call?

Sincerely,

Encouraging Staff by Announcing Training Classes: Guidelines and Alternate Phrases

- ▶ **State the subject of the special training classes. Other brief details such as where and what time can often be given in one “message” statement.**

As part of our effort to standardize our sales message across all regions, we have scheduled the Western Region Training Class for July 17 at 8:30 a.m. in the Denver office meeting room.

Please plan to attend the Spring Fling Sales Seminar on March 24 at 9:00 a.m. in the main conference room.

- ▶ **Explain how your reader can benefit from the training.**

The training seminar will focus on the new video tapes being offered to all current Galaxy owners via a nationwide mailing. We believe the excitement created by our new design will have your customers calling you for delivery dates.

The tips on how to close more sales will help you meet your quotas.

You will be able to build new networking opportunities with the other attendees.

- ▶ **Be clear about whether attendance at the training is required or optional. Mention any limitations or special conditions of attendance. Ask for confirmation, if necessary.**

Your attendance is required, although you may choose between the morning and afternoon sessions. Confirm your choice by calling Donna at 713-4755 no later than noon Friday.

We always have more people requesting reservations than we are able to accommodate, so please return your RSVP as soon as possible.

Announcing Training Classes (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Regular Training

All sales reps routinely require specification updates and technical briefings as part of their job. In order to assist you in these tasks, we have made a reservation for you to attend the three-day "Get Up-To-Date" seminar.

Dates: August 3-5
Location: Seattle Plant Training Room
Time: 8:30 a.m. to 5:30 p.m. each day

If you are unable to attend, please contact your division director.

As a result of this training, you will:

- Have more confidence in your ability to answer customer questions
- Know exactly how to do the customer-required maintenance on the latest models
- Receive specifications for all revisions of all models in your own files

As preparation for the class, your assignment is to prepare a list of technical questions you have been unable to answer adequately without consulting tech support.

Howard Schmidt of Tech Training will conduct this training session. Those who have attended this seminar in the past have evaluated it as one of the best training events they ever attended.

Please look forward to a productive three days!

Announcing Training Classes (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: New Training Classes

Would you like to make repeatable and faster telephone contacts? Would you like to increase your productivity in setting appointments? Would you like to close more sales on the initial sales call?

On August 10 in Flagstaff, we are offering a half-day seminar to provide you with key information on:

- Computer software to track your calls and keep remind you of recall requests
- Persuasive techniques to set up the face-to-face meeting

People who have a basic understanding of telemarketing will benefit most from this technical presentation. We encourage you to contact Jim Miller at 214-311-3799 to reserve a seat.

Prerequisites of the seminar are six months of employment and Level One status. As participants, you will receive useful reference materials on potential bonus participation.

Mark this date on your calendar and give Jim a call. Seating is limited to the first 25 people.

Encouraging Staff by Combating Negative Media Coverage: Guidelines and Alternate Phrases

- ▶ **State the issue that is receiving negative attention in the media. If the coverage is not widespread, describe what has been reported and in what media it has appeared. Your sales staff needs to hear about the issue from you before they are surprised by a customer's questions about it.**
- ▶ **State the correct information and give your sources, or offer facts and reasons in support of your own position. If there is any truth to the reports, acknowledge it and describe any actions you are taking to minimize dangers or damages. Be careful in your wording. Your staff will use this letter in dealing with the questions and concerns of your customers. Word the letter or memo as you would have your salespeople explain the issue to a potential client, or give explicit instructions on how to respond to questions from customers.**

Until further studies are complete and conclusive, we have asked our distributors to remove our dairy products from their shelves.

We have investigated all possible causes for our SmoothSkin bath oil's association with the flu-related symptoms and find absolutely no connection between this product and the reported symptoms. We have presented our evidence to the media and have requested continued review of the case from the Food and Drug Administration.

Although we believe, and all the evidence to date suggests, that the bottles of Relief were tampered with and replaced on the Union Pharmacy shelves, we are authorizing a full refund to any and all customers who request a refund or replacement.

We have identified the specific batch of PXR fuel treatment that contains the flammable additive—the affected drums, shipping cases, retail cartons, and individual bottles are all marked with this manufacturing information: PXR389072-MA1. This is the only production of PXR that was affected and we have already recovered most of it from our own regional warehouses.

- ▶ **Assure employees that the situation has been handled properly and you will keep them posted of any new developments. Negative publicity doesn't just affect sales figures; it causes stress among your staff people. Show your appreciation for their efforts.**

We will keep you informed every step of the way until this situation is resolved.

Please assure your customers, friends, and your own family that we understand their concern and are cooperating in every way with the investigation.

We know you share our regret at this unfortunate incident, and we thank you for your support of our products and our staff.

Combating Negative Media Coverage

Memorandum

TO:

FROM:

DATE:

SUBJECT: Negative Reports on the Seattle Sport Coupe

During the last few days you have been exposed to much negative reporting in the media about the safety of the Seattle sport coupe. I'm sure some of you are discouraged by what you have read and heard. You may also have been asked by colleagues, friends, and family for a more complete explanation.

We believe you have the right to know the complete story with all facts put into the proper perspective. To that end, we offer you the following information/perspectives:

Media Implication: The brakes on the Seattle failed many safety tests but were released to the public anyway.

Response: While it is true that some of the first Seattles off the assembly line did fail their safety tests, these cars never left the factory, and the problem with the brakes was fixed. We run tests on all our automobiles as a safety precaution, and the discovery of this problem before any customer sat behind the wheel is a testament to how well the precaution works.

Media Implication: Universal Automobiles continued to produce the Seattle even after many accidents had occurred as a result of faulty brakes.

Response: Three accidents occurred in the last year that have resulted in lawsuits against UA. The first of those lawsuits was thrown out of court when it was revealed that driver of the Seattle was intoxicated. In the second case, the cause of accident was determined to be the customer's improper maintenance of the automobile, and UA was cleared of all blame. The final case is still pending, but we are confident that UA will be shown to be faultless.

We continue to believe that our company has acted responsibly in light of the current information. As other facts become known, we will provide further information to you about this situation.

In the meantime, we are grateful to you, our employees, for your continued loyalty during these difficult times. We in management will do our best to deserve your confidence as UA moves forward.

Encouraging Staff by Offering Sales Helps, Tips, or Techniques: Guidelines and Alternate Phrases

▶ **Mention the new sales aid immediately.**

Enclosed is information on the new brochure specifically designed to emphasize the changes in our 20– series.

We have developed a new line of advertisements as shown in the accompanying notebook.

You will receive one of these “Tip of the Week” posters every Thursday.

The key chains with our new logo are now available from Central Supply.

A Free One-Year Lease is the grand prize during New Customer Appreciation Week.

▶ **Describe how the sales aid is to be used. Explain how it can benefit the reader. If you have already used the aid, you may wish to give a brief testimonial on how it has helped you.**

I sent the new brochures to several of my customers who were sitting on the fence; all but one of them placed an order within a week.

The logo calendars can be used to keep Franklin Consulting—and your name and telephone number—right on the desk of every client's secretary.

You may distribute these special coupons for 10 percent off to any of your customers. Be sure to emphasize the expiration date in order to boost this quarter's sales.

Inquiries should start coming in within a few days of the television ad introduction. Plan now to capitalize on this interest in Power golf clubs.

These free tickets should help you build on your existing relationship with your clients.

▶ **End on a note of encouragement and challenge.**

Help us meet the newly revised sales quotas by exceeding yours!

We have every confidence that you will use the new test results to improve your rate of conversion from any of our mid-line models to the new Stellar.

The techniques developed by Bob over the length of his career made him our top salesman. Use his tips to take over his position.

▶ **Be brief.**

Offering Assistance: Mentioning New Sales Helps (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Point-of-Purchase Displays

Please plan to include one point-of-purchase display with each order from your dealers.

The display is a mounted poster (front and back) and has a hole in the top for hanging. Suggest to your dealers that they use the display in one of the following ways:

- As an end-of-aisle display, next to the demo model
- As a store window display, by removing the mounting
- As a welcoming display, just inside the entrance

Let's help them sell us!

Offering Assistance: Mentioning New Sales Helps (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: A Book for Every Salesperson's Library

Another great book to help you close more sales: *Setting Sales: Staying On Course in a Sea of Technology*, by James Splinter and Joan Reynolds.

From my own perspective, the most valuable and thought-provoking idea presented here is that in today's depersonalized, high-tech world, the personality of the salesperson has become an even more important factor in a customer's decision to buy.

Specifically, I think you'll find other useful information on the following topics:

- Using advances in technology to open new sales channels
- Positioning yourself and your product or service in the Information Age

The authors are particularly credible because of their work with hundreds of companies (both in high- and low-tech fields) and research in sales trends over the last twenty years. The book differs from others on this topic in that it has an extensive appendix of studies and statistics to back up its claims.

If you'd like a copy, you can borrow mine; just call me at 555-9090. If you'd prefer to purchase your own copy, the book is available at most bookstores (I bought my copy at Bookworm's at 323 Lamar).

Please make use of this resource. Let's work smarter, not necessarily harder.

Offering Assistance: Mentioning New Sales Helps (Example 3)

Memorandum

TO:

FROM:

DATE:

SUBJECT: New Ad in *Video Week*

On April 12 and 19, *Video Week* will be carrying our national ad for the Smithson RD-300/X. Your branches and distributors should be receiving inquiries and orders from that ad on or about April 13. I suggest that you plan your call calendars immediately to take advantage of this promotion and double your sales with half the effort! Each store that agrees to participate in the chain-wide promotion will need further details from you.

We expect that with the frequency of this ad, the size of your existing customer orders will also increase. Let's plan to write them up!

Offering Assistance: Mentioning New Sales Helps (Example 4)

Memorandum

Date

TO:

FROM:

SUBJECT: Hot Off the Presses—Our New Newsletter

Attached is a copy of our new newsletter, *Southern Sales*. We intend the newsletter to be a weekly aid in sharing account and product information within the south and southeast regions.

Although the specific details are technical, the overall content should be applicable to sales and customer relations and will be an effective tool in helping you illustrate our products' functions and benefits to potential customers.

Please continue to forward your own success stories to us so that we can all profit from group experiences!

Offering Assistance: Mentioning New Sales Helps (Example 5)

Memorandum

TO:

FROM:

DATE:

SUBJECT: New Videotapes Available

Attached is the updated listing of the new videotapes available in the Trenton Video Library. The catalog lists the videos in two alphabetical formats: subject listing and title listing.

If you would like to borrow a tape or receive an extra catalog, please phone me at 214-555-8389.

If you have any tapes you would like to donate to your colleagues, we can certainly make use of them. Multiple copies of those we already have are a bonus. Thanks for any donations.

Let's listen up and watch sales grow!

Offering Assistance: Mentioning New Sales Helps (Example 6)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Selling Techniques Tapes

During your many years as a sales rep, you've probably been exposed to most of the significant "real-life lessons" that form the basis for so much of your success or failure on the job. So have I.

Recently, I attended a seminar sponsored by Venson Associates—a consulting group headquartered in Arlington. There I discovered their telemarketing and sales improvement program.

A great idea! Once a week, I get a ten-minute tape on new selling techniques that can be put to use immediately. Training at its best! In fact, I've worked my way through six hours' worth—and have no plans to slow the pace.

Because I think that this is a rare opportunity to pick up great techniques for beating your sales quota, I am asking Jackie Goodman from my office to give you a call about the program within the next few days. Let's see how good customers you reps can be—please take a few minutes to hear what she has to offer. I think she has a unique line to your success.

Offering Assistance: Mentioning New Sales Helps (Example 7)

Memorandum

TO:

FROM:

DATE:

SUBJECT: *The Bridge* Gets Remodeled

Welcome to the new look of *The Bridge*, the **only** newsletter dedicated to international shipping and maritime commerce. *The Bridge* is now published monthly. Its circulation, in excess of 25,000, will deliver your sales message to hand-picked customer profiles in the developing industry.

Sporting an editorial face-lift, it presents news, features, and comments in a fresh, business format. Its quality is further underscored by a high-impact cover to present a prestigious and valuable reference to executives in the world's shipping industry.

The Bridge is your international sales rep—make it work for you.

Offering Assistance: Mentioning New Sales Helps (Example 8)

Memorandum

TO:

FROM:

DATE:

SUBJECT: New Service Contract Decals

Enclosed is a small sample of the newly revised service contract decal for distribution to all of the stores in your area. This decal has been developed to assist customer service reps in providing the correct discounts. Here's how the decal can help your customer specifically:

- Provides the customer's account number in a place that service reps can easily find
- Lists the phone number to the service hotline for the customer
- Records the history of any repair made to the appliance, so customers get the best service possible

These new decals are now available through the Houston office in any quantities you need.

Offering Assistance: Offering New Selling Tips (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Basketball Playoff Tickets

Rockrow has purchased box seats for the NCAA Basketball playoffs on April 12 through April 26 as a sales tool to help you close orders, find new prospects, and cement friendships with your best customers.

We encourage you to call your best customers and prospects today so you can get tickets for the day or evening that is convenient for you. When you have a customer commitment, call Jessica at 555-1111 so that we can reserve your seats.

The playoffs should be an exciting draw this year:

- Caterers will provide and maintain a lavish buffet for each day.
- Bars will be fully stocked and replenished.
- Rockrow t-shirts and mugs will be provided.

A brochure is attached for further details about the event, including times and locations.

The playoffs are only five weeks away; start calling today!

Offering Assistance: Offering New Selling Tips (Example 2)

Memorandum

Date

TO:

FROM:

SUBJECT: LASA Account

A little “data gathering” from others involved on the LASA account suggests that Joey Random’s hot buttons are:

- 90-day product guarantees
- Competitive upgrade incentives

Therefore, I suggest that you approach him with one of these two options. One tactic might be to give him both items. Or, you may prefer to remind him that we have worked with him in the past, and so far he has never had a complaint about our products that caused him to return them. Finally, you might give him the competitive upgrade discount if he agrees to purchase within 45 days.

Good luck and let me know how I can help further.

Offering Assistance: Offering New Selling Tips (Example 3)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Corporate Profile Selling Brochure

I have attached sections of our corporate profile that I think pertain to your area of responsibility. Would you please edit/update this information to ensure complete accuracy and inclusion of the most current changes in procedures within your office as they apply to your accounts.

I realize that you and your group are extremely busy, and that this seems like another rock on the pile. But if we can get this information together and distribute it within the office, it should be a great time-saver for all.

Thanks to all of you for contributing in yet another way to increase our effectiveness and, as a result, spend more time selling.

Offering Assistance: Offering New Selling Tips (Example 4)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Streamlined Activity Report

How would you like to standardize and streamline activity reporting within the division? At present, I receive weekly reports containing various levels of detail. They tend to be more than I can assimilate and are probably a little time-consuming on your end.

Beginning with the April report, I want to go to a monthly highlight summary. By this, I mean a summary of key activities/accomplishments rather than a record of every phone call or customer visit. Under a heading called "Accomplishments," please include activities such as:

- Noteworthy new accounts acquired
- Special training or seminars attended

Under a heading called Upcoming Calendar, please provide information about:

- Meetings with important clients
- Requested vacation dates
- Scheduled travel times

Other miscellaneous headings from month to month might include:

- Quarterly Review
- Yearly Performance Review

These reports will provide me with a good picture of business within the division. I will, in turn, compile this information from everyone to give you a picture of our team's activities. Attached are several models of this format. Let's see how efficient we can be in April!

Offering Assistance: Offering New Selling Tips (Example 5)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Standard Answering Service Contract

Enclosed for your use in negotiating sales of answering services is a standard contract package. The minimum approved selling price for each is \$___.

Included in this package are:

- A limit of 400 messages per month
- Assistance with script development
- 24-hour service

The contract amounts have been left blank to allow for negotiation on the final price. Should agreement not be reached, contact me prior to terminating negotiations with the customer, and I'll see where we can offer value-added services within the price range we have quoted.

Sincerely,

Offering Assistance: Offering New Selling Tips (Example 6)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Kickoff Meeting

A kickoff meeting for this new sales year has been scheduled for September 4 in the auditorium at 2:00 p.m. We will overview plans on sales and marketing and present pertinent information on schedules, suggested approaches, report formats, do's and don'ts, and administrative matters.

If you are unable to attend this meeting, please phone me so we can arrange to pass this information on to you in another way. We expect this meeting will be the foundation for your building a fantastic sales record during 20–.

Sincerely,

Encouraging Staff by Reassuring After Losing a Sale: Guidelines and Alternate Phrases

- ▶ **Identify the lost sale you are writing about. Your tone should let the reader know immediately that this letter is not a reprimand.**

Although we share your concern over the loss of the Brittain contract, it was the first time we have had the opportunity to bid on one of their projects. We learned a lot about their process and that will be very beneficial in the future.

We know that the loss of the Robertson deal is foremost in your mind right now. Please remind yourself that it was a very long shot from the beginning.

- ▶ **You may wish to offer your opinion of why the deal wasn't closed. If you believe that it was in some part the fault of the reader, save those comments for a later meeting, after the "sting" of the lost sale has subsided. Remember, the purpose of this letter is to help the reader regain his or her confidence and get back out in the field.**

I understand from a friend of mine, who is on the Board of Morton Industries, that Jameson had the inside track from the beginning due to their past relationship. There was nothing we could do to change that.

The project went to the lowest bidder. As you know, our research proved we could not have produced the job profitably at that price.

We simply do not have the track record to demonstrate our abilities in this area, and until someone gives us the chance, we will just have to keep trying to persuade them that we can do it.

The entire bidding process was a formality due to city regulations. I've heard that the outcome was known by insiders all along. Your efforts have been successful in every other market. We know you will continue working to break into this one.

- ▶ **Reassure the reader that this lost sale will not jeopardize his or her job by expressing confidence in the reader's future success.**

We have every confidence in your ability to continue to be our top salesman for the region.

Put this deal behind you and get on with what you do best—selling our cars!

Your record is unsurpassed and we're behind you in every way.

Reassuring Staff After Losing Sale

Memorandum

TO:

FROM:

DATE:

SUBJECT: Forget Hearthside Hotels and Move On to Bigger Things

As I understand it, Hearthside Hotels has decided against purchasing our Heritage beds. From my discussions with Robert Tucker, it seems that Hearthside's management simply has a closed mind about classic iron beds.

From my point of view, you have done everything possible to investigate the customer's situation, highlight ways our beds can meet those needs, and present a feasible financing plan for the purchase.

My suggestion: Write this one off! We both know that we can solve the customer's problem with a quality product and excellent service. I'm sure you're disappointed to lose this sale, but your track record over the last seven years underscores that the loss was the customer's—not yours.

Let's put this one behind us and move forward. We have every confidence in your future with Heritage Ironworks.

Encouraging Staff by Sharing Leads: Guidelines and Alternate Phrases

- ▶ **State the reason for your letter or memo up front. Identify the potential customer immediately.**

Last week I met an old classmate of yours, William Mandell. He is head of Purchasing for Western Cellular and would be an excellent prospect for our new TBL switching devices.

I had a conversation last night with Grace Carson. She mentioned that her firm, Carson Productions, is currently searching for land for a new studio. The Stone property immediately came to mind, and I told her that you would be in touch with her right away.

We have an opening with Richard Mark at Trident to persuade him to let us pitch our services to their board members.

- ▶ **Provide background information in addition to the lead's company, contact and phone number. How did you come across the lead? What specific products or services is he or she interested in? Is he or she expecting a call? In short, try to provide all the information in your memo that you would like to have when you are pursuing a potential customer.**

As you know, Trident is unhappy with the television spots that DC&B designed for their Super Bowl ads. They want a new focus with a catchy tune and snappy tag line. Their record is one of making a quick change when an agency creates a theme they like. See what you can come up with and please contact Richard at 425-789-6767 this week. He is expecting your call.

Use our research database to gather all Datagen's technical specs on the last laboratory facility and put together a specific package that will target their needs. I have a meeting with Bill on Friday at 11:00 a.m. and would like you to be there to present your ideas along with mine. We need to demonstrate sufficient depth of experience on similar projects as well as management and financial control to win this job.

Claire wants you to lead a presentation targeted at why our Synergen laptops should replace the Ajax models the auditing staff now uses. Complaints with the Ajax have focused on weight, speed, screen size, and short battery life. All reviews have named us best in the notebook field but we must demonstrate that the test results can be duplicated in the workplace. Please arrange to have at least three CM, KM, and SM models up and running at the start of the meeting. We will leave them at Bartlett's offices until the end of the week.

Sharing Leads (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: A New Lead in Las Vegas

Last week while traveling to Cleveland, I met a fellow passenger, Bobbi Smith, who expressed an interest in our casino equipment sales. I gave her your name as the local sales rep in her area.

If you would like to pursue this lead from your end, you may contact her in Las Vegas at 555-5757. If for some reason you can't get to her immediately, let me know and I'll pass the name on to someone else.

Specifically, I think her key interest is slot machines. You might want to approach her on the premise that buying an assortment of equipment would be better for her plans.

Best of luck.

Sharing Leads (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Lead on Potential Kansas City Customer

I recently met a Ms. Lynda Hardie, who I think is in the market for a new long distance provider. I gave her your name and suggested that she call you. But just in case she drops the ball, I've attached her business card for you to make contact.

Ms. Hardie and I were both caught in a long layover at Atlanta's Hartsfield recently, and our talks led to her interest in making a change. She is somewhat into the proposal process already, having solicited bids from CBM, Eagle, and National Bell, but she says the company will not make a final decision until April when she returns to Kansas City.

From our brief talks, price does not seem to be her concern; quality service after the sale is. I told her your international division excels in that area.

Hope this trail leads somewhere. Good luck!

Sharing Leads (Example 3)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Information about Chilton Co.

We are aggressively pursuing the Chilton Co. account here at headquarters in Miami from a corporate perspective and have learned several things in the past six days that may be of help to you as the target rep on the local account.

- Chilton was originally owned by Texas millionaire James Chilton before the Naughton Corporation bought it out.
- This buy-out disrupted management dramatically, particularly in research and development.
- Research and development will double its budget thanks to this buy-out.

Please let us know any additional information you may have gathered regarding this prospect, and we will continue to keep you posted on all activities that may be pertinent to your involvement. Together we should be able to do some profitable business with Chilton.

Encouraging Staff by Sharing Positive Media Coverage: Guidelines and Alternate Phrases

- ▶ **Identify the source of the positive publicity immediately and provide a general summary of the report.**

Our new tractors have stirred up quite a commentary in *The Combine News* and we want you to share the enthusiasm with your staff and your customers. We appear to have a winner on our hands and production will be challenged to keep up with demand.

Enclosed you will find a very complimentary feature story from *The Morning Gazette* that is very complimentary. It associates our new Green line with the environmental movement gaining strength across the region. This free publicity is usually more beneficial than any ads we place. We hope your sales this month will show a marked increase.

- ▶ **Elaborate on the detail. Mention all the information that will be useful to your staff in their dealings with customers and potential customers. If the coverage appeared in a magazine or newspaper, you may wish to attach a copy of the clipping.**

A copy of the article is attached. We have highlighted the specific performance features that are helping us beat all the competition. The reviewers thought our new fuel efficiency was even more important than the improved torque. Perhaps your customers will feel that way also.

The article on the increasing popularity of mountain biking in *Newsweek* features our ToughTrek models. It specifically targets our medium priced line with pictures of the 24 and 26 inch Hill Climb bikes. We have ordered 10,000 reprints and expect to forward them to you next week.

- ▶ **Use an upbeat tone. Help the publicity generate enthusiasm in your sales staff that will rub off on your customers.**

The reviews should bring new customers in just to see the new styling for themselves. You can work from that interest and create sales.

We expect more of these reviews, as well as feature articles, in the upcoming months. The new public relations agency is working hard to prove their value to us—and to our bottom line. We need to be ready for the increased demand.

Sharing Positive Media Coverage

Memorandum

TO:

FROM:

DATE:

SUBJECT: High Ratings in *Consumer Day*

An article in the June 3 issue of *Consumer Day* features our newest washing machine. The survey confirms that our Autorinse model washers are the most cost effective and environmentally safe. We urge you to read the article for further support and data to offer your customers.

The article highlights and evaluates cleaning quality, power consumption, and purity of discharged water. While Autorinse ranked high in all three categories, it used the least electricity and provided the best filtration of discharged water of all models reviewed.

The article also speaks highly of Autorinse's service and customer commitment

Our own research and marketing data, of course, have revealed this outstanding performance, but it's always nice for the industry media to recognize and reaffirm our own findings.

Please make use of this coverage as you call on both existing customers and prospects. And keep reading!

Encouraging Staff to Solve Customer Problems: Guidelines and Alternate Phrases

- ▶ **State the customer or client whose problems you are addressing up front.**

The snafu with the Goldberg order should not have occurred and can not happen again.

Don Miller, President of Miller Engineering, called to discuss the errors in the K-Bar Survey we completed last week.

As you know, the incorrect shipment of circuit breakers to Smith Electric has created some questions about our ability to supply their just-in-time production line.

The shipping delay for the Carter Farms catalog operation has been a very expensive lesson in how not to schedule our fleet.

- ▶ **Detail specific points of concern with the client. State the steps you want to take in correcting these problems. If this letter is a general one addressing all clients, focus on a few ways you want your staff to improve their relations with customers.**

Take every possible step to assure that this does not happen with another customer. We cannot afford this kind of mistake. Be sure to brief **all** personnel on the safeguards that have been put in place to prevent a reoccurrence.

In spite of our desire to increase revenue, we must not commit to a new customer unless we are absolutely certain that our scheduling will meet or exceed their expectations.

Several of our clients have expressed concern about our ability to operate efficiently during the move to the new warehouse complex. Please assure them that our plan was developed to provide a seamless transition from the customer's viewpoint.

- ▶ **End with a note of confidence and encouragement.**

Your attention to total customer satisfaction will continue to serve you and Tucker Industries well.

We have every confidence in your ability to restore the relationship with SJKB.

Solving Customer Problems (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Taking Care of Business—The Customer is The Business

Why are we in business?

Who pays our salaries?

Who are we employed to serve?

Who is the most important person we deal with?

The obvious answer to these questions is **THE CUSTOMER**. Customer orientation is the key to our success. We never want to come to feel that the customer is getting in the way, is an inconvenience, or messes up our daily plans. It takes only one negative attitude on the team to alienate a customer, and we can't afford that.

During this season, while we are extremely busy receiving a great deal of merchandise, we are short-handed. Although we're doing as much as possible to recruit more good people, the bottom line is still the same—**THE CUSTOMER IS NUMBER ONE**. We must strive to heighten our sensitivity:

- How do customers perceive the way you are treating them?
- Is the shop clean, neat, well-lighted, and comfortable?
- Is it easy to shop—can customers identify where certain items are?
- Do signs attract customers to our merchandise?
- Are customers greeted quickly and pleasantly?
- Do customers feel welcome?
- Do customers receive real value from their purchases?

I encourage you to do some self-evaluation from the customers' point of view! We may be amazed how many circumstances we can change and problems we can solve before the **CUSTOMER** calls attention to the matter or decides not to buy.

Solving Customer Problems (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: First Bancorp Repair Problems

The First Bancorp account deserves every reasonable effort from us to straighten out the relationship. We need to renew our plans to achieve our quality standards and ensure some equally favorable customer expectations of future performance from us.

I offer the following suggestions to correct this customer's problems:

- Provide a loaner while their machine is in our shop.
- Order all repair parts by overnight shipping.
- Offer a six-month guarantee on the repair work.

Now is the time to confront all the issues fully and resolve them before we lose this account. I have every confidence in your abilities to mend this customer relationship. Is there any other support I can offer?

Encouraging Staff to Solve Team Problems: Guidelines and Alternate Phrases

▶ **State the problems you are addressing up front.**

As you know, we have customer service problems to solve.

Our recent customer survey revealed a number of problems with our telemarketing system.

The new order entry system has too many bugs!

▶ **Detail specific points of concerns. State the steps you want to take in correcting these problems.**

Our customers come first. We need to track call volume in order to be better able to plan an adequate level of telemarketing staff on all shifts.

Backup at the customer service counter is hindering entry into the store. Please develop a plan, a time schedule, and a tentative budget to relocate service to the rear of the store.

The order errors transmitted to the stockroom should have been eliminated by program debugging. Have your staff work to correct this as soon as possible and keep me informed of the progress.

▶ **Remember that this letter is intended to make your *team* work together smoothly. Keep the focus on the team. Avoid fixing blame.**

Our departments can solve this problem by working together.

I've scheduled a team meeting for Friday at 10:00 a.m. and am confident that together we can come up with a solution within our time and budget constraints.

Let's focus on results—not on blame—and get the system working properly!

▶ **End with a note of confidence and encouragement.**

Let's work together to solve these problems and make this our best year yet!

I look forward to your help in solving these problems for the good of all.

Solving Team Problems (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Team Problem Solving

In this new year, I want us to resolve to handle one part of our jobs a little more conscientiously. During the past year, the situations have many times been:

- No one individual responsible for an account
- Too many individuals responsible for an account

These are just a few examples—situations that can cause a great deal of distraction, frustration, and lost sales.

Here are my suggestions for turning the tables:

- Name a team leader for each existing account. This individual will have primary responsibility for all personnel assignments and invoicing questions.
- Use a revolving method to assign team leaders to new accounts. This method will choose team leaders from an alphabetical list of senior sales reps thus assuring that all receive equal consideration for new accounts.

Thanks for your cooperation on this resolution.

Solving Team Problems (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Personal Banking Officer Turnover

You'll recall that one of the topics discussed during the selling strategies session at our last conference was the ever-changing staffing of Personal Banking Officers at the Branch Banks. The consensus from the discussions was that everyone is experiencing the same problem, that the problem is growing, and that no one has any easy answers.

With this memo are two pieces of information on the subject. The first provides a good basic overview of the problem and illustrates several responses to customers' objections. The second makes a strong point about the ever-changing nature of business. Each statement makes it increasingly clear that we cannot continue to be passive. That approach puts us in a "death spiral" situation.

As you make your plans for the coming year, I encourage you to develop a discipline for facing this problem. Doing so would mean that you:

- Work to develop customer loyalty to Capital National Bank—not to a particular officer.
- Work to develop a smoother transition of Officer Trainees in order to appear more professional. We must avoid the impression that the tellers are more knowledgeable than the officers.

While the natural flow of thinking seems to promote this discipline for defensive reasons, I think the same can apply for offensive situations. If we do the "extra" analysis needed and formulate a plan that well serves our interests and those of our customers, we'll likely win more than our share. Such a plan will probably summarize some specific terms of our plan and could include:

- The benefits to our customers from the knowledge that they are a first priority of every officer at every location of Capital National Bank
- The security our customers will have knowing they can obtain the necessary banking services—quickly and efficiently—from all our officers
- The benefits to our customers and to Capital National from the teamwork process

The terms are unquestionably tough but may be very reasonable with the alternatives our customers are facing.

Good luck!

Solving Team Problems (Example 3)

Memorandum

TO:

FROM:

DATE:

SUBJECT: The Sales Process

In an effort for all of us to understand the sales process better, I have attached a flowchart of the sales cycle from first contact to delivered product. With the sales process flowchart is a list of action items at each step.

Please take time to review this so that when you are working with the technical staff you will be aware of where your particular sale is on the process flowchart. Sometimes our technicians will reverse the survey and the demo steps. By understanding the flow, we can help them stay on track. The appropriate flow is important because when the steps are reversed, we end up doing extra demos or the wrong type of demo for a particular customer.

Understanding the overall sales process should help us coordinate, rather than thwart, each other's efforts.

Encouraging Staff to Try More Closes: Guidelines and Alternate Phrases

- ▶ **Praise the sales staff's contribution to the organization and show appreciation for their successes.**
- ▶ **Detail specific areas in which you would like to see improvement. Suggest steps your readers should take to meet their goals.**
- ▶ **Supply incentives—tangible or intangible.**

Mr. Burke has asked for a list of all the sales reps who have exceeded their quota by 20 percent for this quarter and we're definitely in that group! I think such recognition of our department certainly puts our division in the national limelight. I'm proud of your efforts.

Anyone who reels in at least two new clients will receive a pair of season tickets for the sport of your choice.

I'm counting on this month's extra effort as a personal favor.

- ▶ **Express confidence in their future success.**

Let me see you pull out all the stops again.

You can do it.

Keep up the good work.

The whole organization has its collective eyes on you with these new products. Let's show 'em what you can do.

Here's to exceeding our quota by 20 percent this month!

You've got what it takes; let's put the competition away.

- ▶ **Keep the tone upbeat and informal.**

Trying More Closes

Memorandum

TO:

FROM:

DATE:

SUBJECT: Improving Total Sales in the Third Quarter

Our ranking in total sales has improved in the second quarter. Let's continue this attention to ensure that we meet the division target of 30 percent of our sales!

Due to your efforts, our second quarter shows improvement from 15 percent to 20 percent in June. This is still below the region and division averages and significantly below the division target of 30 percent.

The major areas we need to work on now are:

- Following up with smaller businesses
- Securing higher initial contract amounts
- Pursuing repeat business

Improvements in these areas should significantly increase our standing in the region and give us the opportunity to reach the division target.

I am counting on you to continue to improve our closing ratios!

Incentive Award Offer: Guidelines and Alternate Phrases

- ▶ **Arouse interest immediately. Begin with a provocative question or some other teaser that will pique your readers' curiosity.**

We've reserved a room at the Hilton and a table at Four Seasons in your name! That is, we've reserved a room in your name, if your name is on the most orders from new clients this quarter.

Let's make a trade—two box seats for two new accounts.

I think you'll like our new line of laser printers: they can save more money for your customers and make more money for you!

- ▶ **Give details about the award program, including what your sales people can earn and what they must do to earn it. To avoid confusion later, anticipate questions your staff may have and provide all the information about the program they will need to participate.**

Anyone who reels in at least two new clients will receive a pair of season tickets for the sport of your choice.

Remember that the sliding-scale commission formula is in effect on this new product. Here's your chance for extra bucks this month.

- ▶ **State the overall goals of the program. Mention its benefits to the company and its employees.**

Techtron wants to show its appreciation to the salespeople who help us meet our goal of increasing our market share by 2 percent by the end of this year.

- ▶ **End with encouragement and a challenge.**

Incentive Award Offer

Memorandum

TO:

FROM:

DATE:

SUBJECT: New Incentive Award

How would you like a chance to make some bonus dollars this month without lifting a finger? Well, almost. We need referrals for our new Postage Meter line, and if your referral from one of your established accounts results in a sale of this new line of digital meters, you will earn ten percent of the first year's base fee—a bonus that could range from \$10 to \$100.

Interested? Here are the details:

- Overview of New Service...
- Targeted Market...
- How to Send Your Referral...

Attached is a schedule of pricing, along with illustrations of how bonuses will be calculated.

Come on, lift a finger—do yourself and your customers a favor!

Invitation to Hear Motivational Speaker: Guidelines and Alternate Phrases

- ▶ **Extend the invitation, giving the name of the speaker and the subject the speaker will be addressing. Remember to include date, time, and place.**

We are pleased to invite you to join us....

May we take this opportunity to invite you to....

We ask that you be our guest on May 5 for a luncheon featuring....

- ▶ **Mention some of the speaker's credentials. If possible, include comments about the speaker's presentation from people in your company who have attended in the past.**
- ▶ **Emphasize to your readers how the speaker's presentation is relevant to their situation and will be helpful in their work.**
- ▶ **State the appropriate dress if that isn't apparent by the rest of the invitation.**

Please dress comfortably; our speaker will be asking us to participate in stress-reducing exercises that may require moving around a bit.

This is a very informal get-together.

- ▶ **Mention any fee for the event.**

If you can accept, the \$20 fee is due by August 4.

Of course, there is no charge for this event.

Parking in the Skybird Plaza across the street will be complimentary for the evening.

- ▶ **Ask for a response by a certain date, if necessary.**

We look forward to hearing from everyone who would like to attend by May 5.

Please let us hear from you by May 5. We hope you can attend.

Invitation to Hear Motivational Speaker (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Increasing Personal Effectiveness

We've finally done it—that is, we've scheduled guest speaker Bob Clarke for July 18, and you will directly benefit from that effort, despite the wait!

Industry-wide, Mr. Clarke is regarded as an expert in the field of effective territory management, and regularly speaks to groups around the country on better and more effective ways to manage your time, resources and energy.

So what should you expect? Specifically, I think you'll walk out of this seminar with techniques and tips to:

- Better manage your correspondence and documentation
- Effectively motivate your staff
- Delegate to the best person for the task

Here are some comments from previous audiences about Bob Clarke's presentations:

- "My day no longer revolves around my in-basket"
- "A positive outlook motivates everyone"
- "Don't look at job titles—look at skills, aptitudes and attitudes"

Mark your calendars for July 18 from 9:00 a.m. to 12:00 noon, or in the afternoon from 2:00 p.m. to 5:00 p.m. Seating is limited, so please call Stacy Smith at 804-328-7947 to reserve your place in one of the two sessions. The location is the Flagship Hotel—Meeting Room C, Prince at Broadway (map included).

Please come join us for an exciting half-day seminar and learn from Bob Clarke's 20 years of experience in the field and his unequalled sales record.

Invitation to Hear Motivational Speaker (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Dynamic Selling Seminar

We realize that the communications field is an ever-changing environment providing constant challenge to the growth and success of your sales career. Not only is this industry itself dynamic, but so too is the challenge of selling cellular telephone service to business and individual customers.

Understanding that both the obstacles and challenges are numerous and confusing, we invite you to a seminar presented by Carol Evans, where we will discuss issues related to selling:

Date:	November 10
Location:	2nd Floor Conference Room
Time:	9:00 a.m.

Ms. Evans has been recognized nationally for her expertise in sales, motivation, and effectiveness. You may have read her most recent book "*Closing the Sale*" or excerpts appearing in *Sales Weekly* or *Retail News*.

We sincerely hope your schedule permits you to take advantage of this help. Carol Evans will recharge your batteries and renew the challenge of moving communication products in this new market!

New Marketing Campaign: Guidelines and Alternate Phrases

- ▶ **Announce the marketing campaign. Be sure to include what product lines and sales divisions will be affected.**

Our new marketing campaign begins on September 1. All electronic divisions will participate with markdowns on regular lines and special promotional items. The attached outline provides all the specific information you and your staff need.

The spring campaign will be launched according to this schedule: Southern and Western Divisions on February 1; Midwest Division on March 15; and the Northern Division on April 22.

- ▶ **Give details of the new campaign. In what media will the campaign appear? When will it begin? How will it change customers' perception of your products or services?**

Advertising begins on August 25 in *The Gazette* and the following weekend on KQUE.

A direct mail piece will go to our current customers on March 1. We believe they will respond with calls for the test drive. Be ready!

- ▶ **Explain how the campaign will affect the sales staff. By showing your staff their place in the campaign and how they may benefit, you generate the enthusiasm necessary for the campaign to be effective.**

The television ads will increase curiosity about our design changes and your regular clients will call for a preview. You can turn this interest into a sale by explaining that the changes are more than skin deep. Stress the new safety and comfort features. Point out the higher efficiency of the new engine. We predict an immediate sell-out and a long waiting list. Be sure your customers have priority.

If you exceed your quota, you will be rewarded according to the attached bonus list. There is no limit on how many of the bonuses you can receive. It's all up to you!

- ▶ **Express confidence in their future success.**

Keep up the good work.

I know you'll do your usual great job with this new campaign.

Here's to exceeding our quota by 20 percent this month!

You've got what it takes; let's put the competition away.

New Marketing Campaign (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: New Marketing Campaign

Charter Equipment Services is about to make an offer that's hard to resist. It's called "Star Treatment." When you read about it in *The Hometown Journal*, I think you'll agree that this program will start to win customers in big numbers.

Because this offer will generate a lot of interest, you'll be in a perfect position to help those customers decide to get serious about buying. We're going to introduce a special lead referral program to help you get those leads over to your local salespeople so they can turn them into sales.

You will play a crucial role in this program. You'll have the pleasant role of presenting the program to your division sales staff. That should be fun, but we don't want you to stop there. You can also expect to present it to all your customers.

Details will come soon from your local supervisor. The program will let you earn more incentive points while you help Charter win. All employees will be able to participate in this program—that widespread participation will make this win a real team effort.

I hope you will decide to be in the center of the action in what should be our best year ever.

Good luck!

New Marketing Campaign (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Computer Expo

Plans for the 20– Computer Expo are underway. Representatives from each district in our area have formed a committee to discuss the plans for this event and make recommendations to ensure its success.

Here are your action items:

- Select product to demonstrate
- Make arrangements with customers for sites
- Transport the necessary equipment
- Determine your show manager

How-to details on each of these items will follow shortly. We'll plan to keep you posted on our progress toward the show as it develops. In the meantime, you can begin your own preparations.

See you at the show!

Documenting Your Own Accomplishments to Colleagues and Superiors: Guidelines and Alternate Phrases

- ▶ **Give the big-picture message of your overall contribution to the company or division.**
- ▶ **Present the specific facts to back up your claims.**
- ▶ **Interpret the significance of your accomplishments: Is this the first such achievement? Has this new training prepared you for specific new assignments or promotions? If so, which ones? Will this skill or idea save money? How much? Does this idea, discovery, program, or procedure have other applications that can be investigated further for use in other departments? Never take for granted that your reader will “interpret” the significance of your contribution or training and reward you accordingly.**

We’ve achieved the highest overall growth rate in the last decade.

This is a 22 percent increase in our newest product line.

This marketing effort brought in 68 new clients, the most significant “new-business” effort in the past two years.

This additional program means that we now have 85 percent of our work force trained in supervisory skills.

- ▶ **Mention dates, where appropriate, to prevent someone else from claiming credit for your discovery or suggestion at a later time.**
- ▶ **Be modest, yet confident in tone. Also, rather than repeatedly using “I” in mentioning your activities, you may use the passive voice for the sake of modesty: “Accounts payable have been reconciled” rather than “I have reconciled accounts payable.”**
- ▶ **Thank others for their help in achieving the goal.**

To each one of you, my sincerest thanks.

To each one of you: You have gained my utmost respect.

Without the expertise of our engineering staff, this new model would still be “chasing around in my subconscious.”

I thank each of you for your individual contributions to the project.

With your continued support and input, we plan to continue this same pattern of achievement.

- ▶ **If you have several accomplishments to mention, use informative headings and lists for the readers' easy skimming and recall. You want them to be able to get the "big picture" at a glance.**

Documenting Your Own Accomplishments to Colleagues and Superiors

Memorandum

TO:

FROM:

DATE:

SUBJECT: Projects and Contributions

Thank you for the opportunity to contribute to our team effort here in Los Angeles this past year. Specifically, I have been involved in the following activities:

- **New Accounts Sold**
Due in part to the success of the “Service and Security” program, 138 new clients have signed on in my division. These new accounts have brought us \$65,000 in 20–.
- **Orders to Existing Customers**
I have taken orders totaling \$567,500.00 from our existing clients. This amount represents a 15 percent increase in orders from last year and is the highest in the California division.
- **Customer Support Issues**
Our team spearheaded the development of the 24-hour service plan for our corporate clients. This program has helped our division lead the company in orders from new and existing customers.
- **Participation in Management Training**
From January 3 to January 15, I participated in the Management Skills Seminar in San Diego. I attended the Stanford Sales Management Course from April 14 to May 3. These courses have been a terrific benefit as my staff expanded its territory during the summer and fall.

Your advice, leadership, and personal attention to my questions have been invaluable to my success. Thank you for your encouragement.

Commendations to Staff: Guidelines and Alternate Phrases

- ▶ **Begin with your overall commendation for the reader's effort, attitude, or results and then get specific in your praise.**

If you're learning to ride a horse and you fall off, you must climb right back on and try again. It appears that's just what you've done. Your sales record has never looked better—your sales in July were 20 percent above quota!

Under your excellent leadership, the team has continued to shine as the most capable of the region. Your record of completed projects is outstanding.

Although my work involvement with you is now limited, I can honestly say that your comments to us have always been especially timely and constructive.

The technical expertise that you brought to the job was remarkable.

The professional manner in which you conducted yourself at the project meeting with the client had a very positive influence on a job that was in deep trouble from the outset.

The excellent quality of the work you did is unlike anything I've encountered here at International.

You have made an excellent contribution over the year to business growth, leadership, and customer satisfaction. Unsolicited favorable responses about our services have doubled.

You have been instrumental in establishing the necessary credibility with the client.

We have achieved several wins specifically because you are on our team.

- ▶ **Be informal in tone; think of your memo as a warm handshake or the proverbial slap on the back.**
- ▶ **Include names. People, not departments, do work. They like to know that you recognize their individual achievements and contributions. If you have many people to be commended, at least include their names in a distribution list.**
- ▶ **Avoid any negative comments about the situation that may detract from the praise. For example, if you're commending the reader for an excellent proposal presentation to a customer, don't mention that the key decision maker didn't bother to glance through it in the briefing meeting.**

- ▶ **Stay focused on the reader and keep yourself out of the picture. You don't want to sound as though you are tooting your own horn of leadership. Use the "you" approach rather than "we."**

You have certainly made us all look good.

Your professionalism was quite evident in this tense situation.

You used sound judgment that signifies clear thinking.

Your integrity and honesty in all such situations impress upon our customers again and again why they should return to our doors.

Your individual talents will always make the difference in how successful the company becomes.

With or without me around, you always seem to do an exceptional job.

You contributed just the expertise I needed to make the project successful.

- ▶ **Don't sound manipulative. Let your intent be to congratulate on work well done rather than to motivate to greater achievement—although commendations often do have motivational effect.**
- ▶ **Don't focus solely on benefits to the company to the exclusion of personal rewards. If you can say so truthfully, mention any personal or career benefit for the reader that you think will come of the effort.**

I'm very pleased to contribute my support to your efforts in other locations. Please call on me for any help I can provide.

I think this new experience will enable you to handle far more responsibilities than we've thus far given you. I'm looking forward to giving you other assignments that will continue to stretch your abilities.

I will not hesitate to recommend you in any capacity that requires your expertise and self-motivation.

You have the dedication and drive that we like to see at Hilton Associates.

Such effort can't go unnoticed and unrewarded in our organization. In my way of thinking, the sooner the better.

We're looking forward to the opportunity to increase your responsibilities to match your talents.

We have exciting plans for your future here at Bechtel.

Obviously, your move to our division was the right one for you, too.

I hope the work has been as exciting and as challenging for you personally as it has been for the company.

As I hear it, you are making quite a name for yourself around here. Thank you.

I hope other opportunities will surface in the near future that will allow you to gain even more visibility for your efforts.

We will make every effort to let others in the division know that you were the driving force behind the project.

- ▶ **When you can, commend with tangible rewards such as bonuses, increased commissions, public recognition (with a distribution list), or even more responsibility. Never, however, promise what you can't deliver.**

Commendation to Individual Sales Rep (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: 10K For Cancer

Jeffrey, I just want to tell you how much I appreciate the excellent work you did on the 10K For Cancer project. Specifically, I appreciate your help with recruiting colleagues within your department to participate in HMS's efforts to contribute to the community.

Working with you is always productive, as well as enjoyable. Your skills, insight, and creativity have really been invaluable to me personally, as well as to HMS.

My sincere thanks.

Best regards,

Commendation to Individual Sales Rep (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Kevin:

I'm very pleased to see the success that you recently have had with Berzone Model 34. As you can now see, persistence pays off. We've got an excellent product with none of the installation problems our competitors seem to be experiencing.

Now that you are a member of the 10 Group, what could be better than to be a member of the elite 20 Group. I know you have set this as one of your goals, and if you continue as you have recently, this goal should be reality in short order.

Thank you for your efforts on the Berzone series.

Regards,

Commendation to Individual Sales Rep (Example 3)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Good Job on SCA Utilities!

One of the benefits of being a manager is working with people like you. I am very impressed with the thorough job you've done in handling all the problems we encountered on the Southern California Utilities account.

Start-ups and the process of bringing about change are difficult at best. You have handled the job with competence and sensitivity. I was most pleased with the enthusiastic way you carried out your end of the assignment. Specifically, you showed foresight in handling the various internal politics issues within SCA Utilities.

Once again, thank you for a job well done! I wish you the best in this new year as you assume greater responsibility.

Commendation to Individual Sales Rep (Example 4)

Memorandum

TO:

FROM:

DATE:

SUBJECT: The NCC Sale

Over the past few months a tremendous amount of effort has gone into closing the NCC sale. The size of this most recent order is incredible—and a real tribute to your hard work. I could not let this effort go unrecognized. You should be proud of the job you have done to date.

Additionally, I want to take this opportunity to express my appreciation for your unselfish dedication toward the numerous requests for your extra time and efforts throughout this lengthy sales cycle. You have gone above and beyond the call of duty and the results of this dedication are evident. We eagerly look forward to hearing of your next accomplishment, and the next, and the next.

Take pride!

And thank you.

Commendation to Individual Sales Rep (Example 5)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Another Great Year!

Congratulations, Suzette, on another phenomenal year!

Each year I wonder how you could possibly top the previous one, but you always do. As I review your record and accomplishments for 20—, they are almost too numerous to mention. You have:

- Sold \$___ in cosmetics, perfume, and cleansing products
- Remained top sales rep in the region
- Exceeded your quotas for all 12 months
- Published an article in *Natural Beauty Magazine*

I'd like to share with you some of the comments we've received from satisfied customers this past year about you:

- “Suzette provided not only excellent service but an objective view of which cleansing products I should be using on my combination skin.”
- “I took quite a while to pinpoint the colors I wanted to wear, but Suzette always accepted my requests for exchanges happily. I will be a long-term customer!”
- “The ability to have a representative come to my house to educate me on the latest and greatest is a luxury that I cherish, and Suzette adds quality and elegance to the experience.”

We're so very proud of your efforts! Probably what I admire most about you is the warm, genuine, caring nature you display in your service to customers and colleagues here at Betsy Blaine.

No doubt, success comes from your product knowledge and enthusiasm, sales know-how, energy, and dedication. To put it simply—you.

Cordially,

Commendation to Individual Sales Rep (Example 6)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Braxton's Role Model

Every new Braxton, Inc. employee looks for a senior rep as a role model. From day one, you have provided the leadership and friendship that truly qualifies you as a successful model. You have contributed greatly to our team, especially the less-experienced reps, during the past years and I thank you.

Congratulations on your twenty-fifth anniversary; they say the first quarter century is the hardest.

Commendation to Sales Division/Department (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: An All-Star Performance by the Southwestern Division team

I would like to express my thanks to you, John, and the entire Southwestern Division team for a job well done at the Tractor Fest this year. Your team's display promoting the latest version of the Mighty Combine was terrific. It drew literally hundreds to the booth because of the innovative approach to operator comfort.

The entire exhibitor team was informative and knowledgeable, as evidenced by the multitude of customer questions they answered. Customers I spoke with, such as Wayne Redd of Roswell Supply and Nathan Railey of National Farm Implements, commented on the positive experience in their interactions and hands-on demonstrations.

You are certainly always welcome to be our "front" men and women. Thanks again to you, John, and to the whole team!

Commendation to Sales Division/Department (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Thank You!

The Northeastern Public Service sale is a done deal! The equipment is in place and running. The operating staff is intact and enthusiastic. The managers are satisfied. The invoice is paid. In short, the National Electric strategy was a success!

Your division and project leader can be congratulated for this accomplishment. Cheers to you!

Commendation to Sales Division/Department (Example 3)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Training Session for Royalty Hotel Account

I want to thank the Tucson Division for all of the help in training users of ElectroMax at the Royalty Hotel account.

Specifically, Jim Head spent much time working out the best way to train the hotel maintenance staff. It was a time-consuming and often frustrating task, of which Jim never once complained.

In addition, we called on Kevin Ballew quite a few times for his technical advice. His expertise in the initial set-up process continues to amaze me.

Finally, thank you for letting me tie up your own demos while we got the bulk of the products installed. I have really appreciated your efforts, expertise, time, and attitude.

Commendation to Sales Division/Department (Example 4)

Memorandum

TO:

FROM:

DATE:

SUBJECT: The Genie Project

I want to congratulate you and your entire division for your contributions on the Genie project. We've never had a customer more pleased with Kool Quality performance and quality-control procedures.

After the contract was signed, Flare Consolidated's CEO Isaac Johnson expressed to me his confidence in our business partnership by saying, "I firmly believe that our plant will be cool this summer due to our new Kool Quality HVAC system. Thank you."

Thank you all.

Commendation to Sales Division/Department (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

To the Service Personnel:

You're doing it again! You're out in front.

Our money-back guarantee and free evaluation services on the Graton Series are major opportunities for you to continue to prove to your customers that Belton has a superior quality rewind.

I've enclosed a kit that contains full information on our money-back guarantee policy and evaluation services. Please review the kit carefully so that you can give all the details to your customers. In the final analysis, your aggressive participation in the program is key to its success.

Right now, we've got the jump on our competition. But this is not to say that competitive terms and products might not be around the corner. The way to beat out the others is simply to tell our quality story to your customers as fast as possible.

I'll be in touch with each of you personally to see how many calls you've been able to arrange for this next two-week period. I know of no other sales force I'd rather be motivating than you. I have every confidence that you are again going to be the winners in this product line.

Sincerely,

Commendation to Sales Division/Department (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

To the Best Sales Force in the Industry:

Yes, I meant every word of that opening. Our second quarter results show a 39 percent increase in gross sales for the new Selton fans and lighting fixtures. I don't know what you've done differently in your presentations to customers, but keep doing it!

Of course, the new Selton product line can't be oversold. I think the new slimmer line has hit the market at just the right time. The manufacturer's rebate is the icing on the cake. As an additional incentive to get your customers to make an immediate decision, remember to mention that the rebate offer expires August 15.

Thanks for the big push on these products; your enthusiasm shows. Let's go for a 50 percent increase next quarter and ring everybody's bell around here.

Regards,

Commendation to Sales Support Staff (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Good Job!

Let me take this opportunity to thank you for the dependable and courteous customer service you have provided to our reps each time they have called you for repair work. You have been both cooperative and quick in responding to our calls.

Many of our customers now request you personally for their service work and have expressed great confidence in your judgment and know-how.

Again, we at Armatech would like to say **Thank You** for all your hard work, and we look forward to continuing our business partnership.

Sincerely,

Commendation to Sales Support Staff (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: A Job Well Done

What would Revcorp have done without your expertise at the Baldwin site? Both my manager and the customer's manager commented on your technical expertise, energy, and "political" sensitivity.

Personally, I was impressed with your sales accomplishments and the way in which you worked with the client to turn around a negative situation such as this one. As a new Revcorp manager, I owe you a debt of gratitude. Your support and careful coaching were of great benefit to me personally and to the company. Your historical knowledge of the reasons behind the customer's past buying decisions was invaluable in getting us back on track.

It was a pleasure for me to work and share the credit with you. I look forward to another such opportunity.

Best regards,

Commendation to Sales Support Staff (Example 3)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Quick Turnaround!

Even though you weren't aware of it, you recently participated in a contest. We wanted to see who could turn our orders around the quickest—and out of 1,500 orders, those completed by your section were shipped first.

Isn't it great to be appreciated! Thanks for your excellent customer service and turn around. It's so nice to know we can count on a team like yours to make us reps look good!

Thanks,

Commendation to Sales Support Staff (Example 4)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Time for Some Recognition

I want to recognize your group by name for their outstanding support:

(List of names)

They, as well as you, have been most helpful during 20–.

We in the midwest region have taken on a number of new accounts, and your group has been providing excellent support for us along the way. From administering the callback program, to implementing the Airtech installations, your group has worked with us diligently and untiringly. You have also demonstrated teamwork that other groups only strive for.

Specifically, I recall your assistance with the set-up and staffing of the direct sales program. Your participation was key in making this a success.

Your group's support has helped make our 20– success possible, and I know your group will do all it can to help us meet those upcoming challenges and opportunities in the new year. Thanks again for your contributions.

Presentation of Recognition, Bonus, or Award: Guidelines and Alternate Phrases

- ▶ **State what the award or bonus is.**
- ▶ **Describe what the person has done to earn the award or praise.**

We know you were “on call” for 24 hours a day for what must have seemed like an eternity to you. But then, that’s the kind of dedication you always bring to such assignments.

No detail was too small but what you knew exactly who was doing what, when, and where. Such care for the project’s outcome is just something you can’t pay for. Your dedication to the task is so much more than we ever hoped for.

- ▶ **Express what the award or bonus means in symbolic terms.**

This award signifies our confidence in you as the leading spokesman for our organization, the pace-setter for us to follow.

Your championing our cause gives credibility and focus to the pressing issues at hand.

This bonus is a token of the kind of future we think you have with the company.

- ▶ **Be warm, informal, and sincere.**

Again, thanks for your efforts.

Thank you for giving us your very best effort—with overwhelming success.

You gave it your best shot—and it was right on target.

My sincerest appreciation and admiration.

Presentation of Recognition, Bonus, or Award (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Outstanding Sales in 20—

It is a pleasure for me to recognize the fantastic sales you've had in 20—. I really should be acknowledging the success you've had throughout your career with Bretonny International. Your persistence and enthusiasm have generated not only a commendable sales record, but have also shown to the field and the home office your level of commitment to Bretonny International.

As a means of recognizing your success, our sales management team wants to provide you some additional compensation. First, we are pleased to give you a special off-anniversary salary increase in the amount of \$___ annually. This increase will be effective on February 1. Second, we will be giving you a lump-sum bonus in the amount of \$___.

Your success, I understand, has also caught the attention of some other firms in our area. We're not surprised; in fact, we feel good when our people do well enough to attract our competition. We appreciate your willingness to share their interest in you because we want to protect our assets—and you are certainly one of them.

Morale and service capabilities have shown a dramatic improvement as a result of your efforts. Please keep up the good work!

Presentation of Recognition, Bonus, or Award (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Golden Crown Award

The Pickel Awards committee is pleased to announce your division as the winner of the 20– Golden Crown at a banquet to be held on December 17 at the Frank Wayne Auditorium.

The annual Golden Crown is designed to recognize excellence and innovative sales achievement. In recognizing excellence, Pickel, Inc. encourages development and diversification in our customer base. Many managers and customers have submitted nominations for this award; such a response and interest simply underscore the importance of your team's achievements this year.

Our *Directions* newsletter will provide details on the awards banquet. James Ritrow will be calling you with specifics on how we can make this the special event you, as award winners, deserve.

Congratulations.

Presentation of Recognition, Bonus, or Award (Example 3)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Recognition Ceremony

Congratulations! As a member of the Renegade Team, you are invited to participate in weekend activities at the By-The-Sea Resort on May 23. This fun weekend has been planned to recognize your achievement in adding more new accounts than any other team.

To ensure availability of activities that most interest you, please fill out the attached selection sheet and return it to my attention by May 1. The prompt return of this sheet will guarantee that you and your guest will have access to your preferred activities. After May 1, your requests will have to be made directly to the resort, on a first-come, first-served basis.

I have listed below the options involved.

Activities

- Golf on the oceanfront course
- Tennis—indoor and outdoor courts
- Sailing or power boating at the Marina
- Deep-sea fishing at the Marina Offshore Charter dock

Accommodations

You have a condominium reserved in your name. Check-in is on Thursday, May 22, after 2 p.m. and check-out is Monday, May 26, before noon. The rooms, activities, and banquet are being billed against a master purchase order, so only normal travel expenses can be charged to your room. You must personally pay for all other charges and gifts.

Travel

I have enclosed a map and a diagram of the resort area for your reference.

Banquet

Dinner on Saturday, May 24, will be in the Banquet Room, located in the front of the resort hotel. Dress is business attire. Cocktails begin at 5:30 p.m., dinner at 7:00 p.m.

Congratulations again on qualifying yourself as a member of the Renegade Team! I look forward to receiving your selection sheet and wish you and your guest an enjoyable weekend.

Supplying a Referral for a Departing Representative: Guidelines and Alternate Phrases

▶ Recommend the person immediately.

I am pleased to offer you my highest recommendation for Bill Eaton.

For approximately 22 months I've had the privilege of working beside Bill Eaton, and I can heartily recommend him to you.

Without reservation, I highly recommend Bill Eaton to you for any engineering position.

I'm thrilled to be asked to write this recommendation for Bill Eaton.

As Bill Eaton's immediate supervisor for the past six years, I can offer only the highest recommendation for his experience, skill, and personal integrity.

It is a pleasure to recommend Bill to you.

I heartily recommend Bill Frazier to you. We would eagerly rehire him if a vacancy developed.

▶ Detail the individual's association with your organization—length of employment, skills displayed on the job, personal attributes that will contribute to his or her success. The more specific your comments are, the more helpful and more credible the recommendation. If you don't know the individual well or can't offer a high recommendation, you may choose to comment only vaguely.

Bill's willingness to work long hours and his ability to manage time extremely well allowed him to run the department almost single-handedly.

Charles has been active in the community—participating frequently in civic fund-raisers with great success.

Bill was career-motivated and self-motivated in achieving the goals he set for himself as well as those we set for him.

Bill was loyal to the company and his superiors.

Bill has a gentle but persuasive management style that motivates employees, but he can be firm and straightforward in difficult employee situations.

Bill understands budgeting and can live with the budget guidelines set for him.

Bill was very gracious in accepting different shifts when such scheduling became necessary.

Bill's technical skill and judgment are thorough and sound.

I find Ms. Tate to be friendly, reliable, and diligent.

She handles customers well—on the phone, in person, and in writing.

Clair is amiable and completely trustworthy.

Mr. Jones has now moved into a new line of sales, and we are no longer able to use his products or services. However, we are happy to recommend him and his new firm to you.

Her sales skills would be enviable among the most successful saleswomen in the nation.

Bob is a responsible, conscientious employee.

Tom performed satisfactorily while he was with us.

► **Verify the reason for the termination.**

Bill resigned his position as a manager, giving appropriate notice and leaving us with a trained replacement.

Bill left his employment here to accompany his wife to a new job.

Bill left his employment here to accept a position with Highland Corporation.

Bill's employment here terminated as part of a major staffing reduction of almost 40 percent.

Due to the economic situation in our industry, we had to lay off several of our valued employees such as Bill.

Donna simply outperformed the job. Not even six months after we hired her, we realized her skills far exceeded the requirements of the job. We hated to lose her but didn't want to stand in the way of her advancement.

We had to eliminate Sharon's department altogether as one of the economic realities of our declining market share.

► **Close with a summary of your opinion of how the new employee will work out in the position.**

Bill will make a valuable contribution to your organization.

If past performance is any indication of future success, Bill will be a superb employee in your organization. Bill will succeed anywhere he chooses to work.

Bill has been and will continue to be a valuable employee—the kind that keeps customers and clients coming back.

In my opinion, you will be lucky indeed if Bill chooses to accept a position with your company.

Bill will be an asset wherever he is hired.

Bill has my highest regard both personally and professionally.

Bill should prove to be an excellent manager with your organization.

Given Bill's outstanding record here, we would not hesitate to rehire him. You will have made an excellent decision, should you offer him a position with your firm.

We think Joan will prove to be a valuable asset to your organization.

Don has my highest regard. You will be very lucky to have such an employee.

We think you'll be very pleased to see how Don James performs.

Supplying a Referral for a Departing Representative

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Jess:

We have a former sales rep whom you may be interested in interviewing when he arrives in Spain on March 5. This past week Jack Radley resigned from our Houston office to seek sales opportunities for our software products in your country. He plans to establish a distributorship of his own and expand his marketing efforts into several diversified areas of high technology.

In my exit interview with him, he expressed a great deal of interest in distributing your products in his new business venture, so I offered to communicate his interest to you.

Jack Radley has been associated with our company for 7 years. He established our sales and marketing network in Madrid, and therefore, is quite knowledgeable of the market there. Furthermore, he established a sales office in Seville to market a word processor manufactured in Spain.

I believe Jack Radley may be of interest to you specifically because of his ability to understand and interact successfully with a variety of cultures.

Please phone me at 555-555-5555 if I can answer any further questions about Jack. (Attached is a summary of his qualifications.)

Sincerely,

Offering Suggestions to the Manager: Guidelines and Alternate Phrases

- ▶ **Summarize the problem or situation up front.**
- ▶ **Suggest your solution or improvement.**
- ▶ **Be as specific as possible, with details to convince the reader that the matter needs attention and to convey the appropriateness of your suggestion.**
- ▶ **Keep your tone helpful rather than adversarial or judgmental.**

Do you agree that this might solve the problem?

What do you think of the idea?

Does this suggestion merit further consideration?

Are you interested enough in the idea that I should gather additional information?

May I meet with you to discuss this further?

Shall I do some further research on this?

I bring this situation to light only to offer my help in finding the best solution to the problem.

I'm sure you are aware of the problem, but I wanted to let you know of my concern and interest in improving the situation.

Offering Suggestions to Manager (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Using Videos to Train Retail Sales Reps

I have an idea to increase sales on the WaveRider product line by using videos to train retail sales reps on the quality of our surfboards. Would you please review the idea (detailed below) and decide whether it's a feasible, innovative approach.

Getting the video to the stores would require four steps: writing the script, finding talent, shooting and editing the video, and duplicating copies.

Writing the script: This is the easiest of the steps. The standard training script given to our sales staff to present to retail employees could be used with minor modifications and additions.

Finding talent: Any of our sales reps would do, though Henry Sharp has some acting experience and has indicated he would be willing.

Shooting and editing: I talked with James Webb of Name'n'Lights Inc. at the sporting goods trade show last week. He said his group could put together an estimate that would include filming at his studio and online editing with his equipment. I discussed our training presentation with him, and he said he could get it shot and edited in a week. He also suggested we mix in some footage of our boards to liven up the video.

Duplicating copies: James Webb has a list of service bureaus he uses and would include the costs in his estimate.

Certainly, the idea will make our job easier by reducing in-person presentation time and will ensure a standard, quality presentation at all locations.

What do you think?

Offering Suggestions to Manager (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Comments and Suggestions about the Wilkinson Sales Report

At the last staff meeting you asked for suggestions concerning the Wilkinson Report. This report, in my opinion, is well done and gives a comprehensive run-down of midwest sales. The statistical data is particularly helpful in generating insights into many aspects of our business such as sales in the education and government markets.

My only suggestions are to include information comparing sales with other regions (particularly the West Coast), to expand the analysis of age demographics, and to omit the unnecessary description of every product in the line.

All in all, I appreciate Hayworth Inc.'s management for providing such a sales report. I assure you the information helps me do my job.

Offering Suggestions to Manager (Example 3)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Supplying Sales Reps with Car Phones

A car phone can be a great productivity tool for everyone. But the productivity gains for Glyson Company sales reps can be especially significant. A recent study in *Fashion Sales* cited survey results that indicate traveling salespeople who have cellular phones spend 70% of their phone time talking to clients from cars or planes.

Because my position requires me to travel to and from Raleigh, a great deal of my time is spent in transit. In addition to the local travel, many trips to Charlotte, Chapel Hill, and Richmond for training are necessary. In keeping track of my travel hours for the past two months, I've spent over 100 hours on the road.

I can easily handle multiple tasks while driving a car, specifically, following up with customers and service reps.

The investment in a cellular phone can pay big dividends for Glyson. Does Glyson have any plans to help us use our time more productively by conducting business on the road, rather than only from the end of it?

Respectfully,

Requesting Suggestions from Staff: Guidelines and Alternate Phrases

▶ **Briefly pave the way for your request for suggestions.**

We've said it before and we'll say it again: Our employees make the company what it is. And we are again asking for your help.

In an effort to update our library and its usefulness to you as employees, we need your input on the kinds of periodicals most beneficial to you in performing your jobs.

We need your help once again.

May we count on you? Do you have five minutes to spare?

As you are well aware, we have undertaken to reach some goals that most of our competitors would think are impossible. And we need your suggestions for reaching them.

▶ **Be as specific as possible in what kinds of suggestions you want.**

We'd like you to respond to the enclosed questionnaire about your perceptions of waste in your own department.

We ask that you simply telephone Marg Atwell (453-6687) with your comments about cost-cutting measures you've taken in your own department.

We'd like you to attend the upcoming cocktail hour in the lower lobby and visit with our senior managers about what you perceive to be our biggest challenge in 19--.

Would you drop a brief memo to Marcell Whitley, our training coordinator, telling how many seats your department should be allocated if budget were no problem.

▶ **Make it easy to respond; remember that their cooperation is voluntary.**

The questionnaires do not need to be signed.

You can drop your suggestions into designated boxes at each elevator bank.

We will keep all comments confidential; please feel free to be as frank as possible.

These letters will be opened only by the administrative assistant in that department and forwarded to us in a batch with all names removed.

▶ **Point out how individual employees and the organization as a whole can profit from the suggestions.**

Requesting Suggestions from Staff (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Request for Suggestions for April Regional Meeting

On April 3 and 4, I will be attending the Sailboat Division's regional meeting in San Francisco. The purpose of this meeting is to present ideas generated from the field concerning ways to improve the sales of WindSkimmer 38.

Therefore, I'm asking you to provide any suggestions that you or your customers may want to pass on to "the powers that be."

Seriously, here's your big chance to change strategies, improve products, standardize services—whatever. Below is a list of topics that may stimulate your thinking:

- Cabin configuration—which features should be optional and which standard?
- Auxiliary engines—should we stay with the diesel?
- Standard sails—should spinnaker be included?

I would appreciate a response from each of you by April 1 so that I may prepare the suggestions for formal presentation at the meeting.

Sincerely,

Requesting Suggestions from Staff (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Submit Your Suggestions for the New Marketing Program

A quick reminder is in order concerning a few issues important to your next few commission checks! Would you please develop and submit for review, by December 29, your suggestions and plans for your 20– marketing program. How will you promote your existing and new product lines? What has worked well for you? What ideas can your colleagues also profit from?

These wintry days are short and not busy in the normal ways—a great advantage in planning for the 20– season. If we don't get it done now, it won't happen. Begin to strategize where, how, and when you will introduce your newest customers to our broader product lines. Your 20– sales success will be a direct reflection of your current planning. Suggestions from you in the field are critical to our management success.

As always, our hours are from dawn to dusk. Let us hear from you by December 29.

Responding to Suggestions: Guidelines and Alternate Phrases

- ▶ **Express appreciation for the suggestion, initiative, and interest shown.**

We appreciate your interest in writing to us.

Thank you for taking the time to put your ideas on paper for us.

We appreciate your initiative in suggesting a change in upholstery fabrics for our interiors.

We always enjoy hearing from our customers, and your letter was no exception. Your suggestion for the new plants around the building has merit in a climate such as ours.

- ▶ **Repeat enough details of the suggestion so that the reader knows you have given it proper attention.**
- ▶ **State what action you plan to take on a good suggestion.**

Let me forward your idea to the responsible manager and she will be in touch shortly.

- ▶ **Summarize the benefits gained and your appreciation for a suggestion you can use.**

We think this idea should save us almost \$10,000 next year alone. We commend you for this farsightedness.

You are so right in your analysis of the situation. We can certainly count on at least an extra hour's productive time each day. We appreciate your calling the matter to our attention.

We will not lose sight of what you have contributed to the company in a way that you have probably considered "a small matter." We think your suggestions is an excellent idea, and you deserve much credit for it.

- ▶ **If you cannot use the suggestion, explain under what conditions you might reconsider.**

Should we have need of an outside legal firm, I'll keep the name of your acquaintance on file in my office.

If the situation seems to be changing in the next few months, I'll get in touch with you for more details about your idea.

If our budget does call for an increase a couple of years down the line, I'd like you to bring this to my attention again then.

If we do decide to eliminate the Ohio division, this idea would make perfect sense at that point. Keep it in the back of your mind for that occasion.

If sales should pick up, however, in the next year, we would want to reconsider these value-added suggestions. They do have merit.

Responding to Suggestions

Memorandum

TO:

FROM:

DATE:

SUBJECT: Response to Your Suggestions for OfficeNet

Thank you for your honest feedback from your customer, Julie Hutchins, at Benco. Although her comments were not encouraging about follow-up sales there, we are encouraged by the opportunity to consider your suggestions for improvements.

Basically your idea to allow our LAN remote connections is a sound one, and one that, as I'm sure you can imagine, will require a large up-front investment. But that is not to say that investment would not pay big dividends in future sales.

I plan to follow up with Jim Stacks within the next few days to get more specific details on various aspects of the OfficeNet's performance. With all the facts in hand, we can make a thorough review of the work to be done.

Thank you for taking the time to bring this feedback to my attention. It's that kind of sensitivity that leads to continuing product improvements. I'll be back to you as we study the situation.

Requests for Help from Colleagues, Staff, or Managers: Guidelines and Alternate Phrases

- ▶ **Focus immediately on the help you need. Don't make your request a by-the-way item toward the end of the memo.**
- ▶ **Be specific about what you need, including dates, amounts, names, approval signatures, or appropriate format of the information.**
- ▶ **Tell why you need the information if the reason is not obvious. Occasionally, when readers don't understand the necessity for some action or information, they "pick and choose" what data they think you need rather than respond with what you want.**
- ▶ **If you are working under a deadline, include due dates. Phrases such as "at your earliest convenience" may be intended as a courtesy, but they invite procrastination; if you have a due date in mind, say so. Be careful to avoid the double-due-date effect—that is, if you are requesting information that you in turn will incorporate into your own work and then supply to someone else, don't state both dates. Such an explanation lets the reader know the "grace" period built in for your benefit. The two dates, therefore, become leeway (in the reader's mind) for getting the information to you. For special emphasis put the due date in a paragraph by itself.**

Could you have the updated summary to me by May 6?

Would you let me have your reply as soon as possible?

Thank you for any information you can forward to us immediately.

I'll appreciate your helping us meet our July 7 deadline if at all possible.

- ▶ **Anticipate the reader's steps in preparing the information. The more questions you can answer before they're asked, the sooner you'll get your information.**
- ▶ **Avoid using a demanding tone.**

Request for Help from Colleague (Example 1)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Installation Problem with Unite Software

Jerry, I have been having a problem with Unite and need your help to find out more about it to help all of us understand how best to present it to our customers.

As I see it, the problem is that the installation instructions provided in the software manual are presented in a different format than the instructions on the disk label.

Could you please have someone locate the appropriate information and help us get to the bottom of this issue?

Request for Help from Colleague (Example 2)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Chicken Little Advertising Account

I want to thank you for getting me past information so promptly. Another request:

As I mentioned to you on the phone, I'm helping the director at the S & S Agency, Julianne Croy, with a plan for her client and their franchises. As I understand it, the agency is making recommendations only; the final decision will be made by local franchisees.

Therefore, it would be a good idea for you to follow up locally. I'm sure you can get the name of the franchisee in your area from the store managers listed here:

- Robert Caudill Main Street store
- James Martindale BU campus store
- Harriet Dockerty Greenville Mall store

I've passed along your retail rate card and other appropriate information to the agency. Please let me know of any significant developments.

Request for Help from Colleague (Example 3)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Information Needed for Upcoming Smithville Electric Company Project

I've detailed below the latest information I have on the Smithville Electric Co. project after speaking with two Smithville managers last week. What I need from you is a statement of our position with this customer. I need to meet with Martin Schlesinger again on January 12 to convey our position on this situation.

To detail my latest information:

- The anticipated delivery date of the emergency generator is June 15.
- The shipment will be delivered by railcar to the Smithville siding at the Walsh Plant.
- Installation and start-up will be a joint effort of our firm and Smithville.

Thank you for shedding some light on this situation.

Request for Help from Colleague (Example 4)

Memorandum

TO:

FROM:

DATE:

SUBJECT: Energy Associates Fax 1200

I have just now ordered a new Fax 1200 to be shipped overnight to a very angry customer and am suggesting we pay for the entire replacement out of our own budget. Have I gone out on a limb by myself in trying to appease one of our biggest customers?

Here's what happened: Dick Jacobs was very angry when he returned his Fax 1200 for repair to the retail store rather than to our designated service location. The Fax 1200 worked fine on self-test but stopped on the first actual use. Our technical support staff informed the customer that the main circuit board was seriously flawed and that it needed to be replaced. This Fax 1200 is necessary to the customer's day-to-day business, and he wanted it replaced immediately. He is unwilling to pay the restocking charge and wants the whole Fax 1200 replaced.

I am anxiously waiting an answer so I can finish the paperwork.

Request for Training Classes for Staff: Guidelines and Alternate Phrases

- ▶ **Request the training you want your staff to receive. Make sure your reader is clear on all the logistics of the training: what it would cover, who would be providing it, and so forth.**

We want every salesperson to understand the new changes in the MP450. Technical support will conduct the sessions every morning next week at 9:00 a.m. in the conference room.

John Lewis, author of *Effective Selling*, will conduct the class on June 12 at 1:00 p.m. at the downtown Hilton. He will concentrate on helping reps turn leads into sales. His presentation will be brief to allow for some role-playing demos and a question and answer session.

- ▶ **List potential benefits of the training, show how the training will improve the bottom line. Identify areas where additional training will improve sales.**

Understanding the benefits that the new model changes will provide our customers will make selling easier. The new, lower production costs improve our profitability and the resulting sales bonuses.

If the sales reps can quickly explain and demonstrate the ease of maintenance, the benefits of buying our lathes will be obvious to their clients. The class will provide hands-on, individual training in just one hour.

- ▶ **Use a more formal tone. Think of this letter as a proposal rather than a request for a favor.**

Please encourage your staff to attend. We believe it would be very beneficial for you to plan that at least a few key individuals attend the morning or afternoon session.

Request for Training Class

Memorandum

TO:

FROM:

DATE:

SUBJECT: Request for Training on the Inkjet Cartridge EconoKit

As our Inkjet Cartridge EconoKit marketing becomes more successful, we are realizing the lack of formal education available to regional sales personnel to develop the skills necessary to:

- Adequately answer “How-To” questions
- Explain the full economic benefit of EconoKit to our customers
- Describe our “Satisfaction Guaranteed” policy for EconoKit

We are requesting that a formal half-day class be developed, taught, and funded by the Engineering department.

The proposed class should focus on developing the following skills:

- Quick demonstration of the Econokit refill process
- Adequate comparison of Econokit cost versus new inkjet cartridges
- Simple explanation that our policy makes trying EconoKit a no-risk proposition

Currently our only alternative to develop the necessary skills is a unique internship, an alternative we have found impractical because of travel time and isolated locations.

Until the proposed class is developed and offered, we risk falling short in capitalizing on the potential that exists for all cartridge refill products in our territory.

Please let me know what your plans are for this additional training.

Cordially,

Request to “Tutor” a New Rep: Guidelines and Alternate Phrases

- ▶ **Begin the letter by requesting that the reader tutor the new rep. Make sure that the reader understands that this letter is not simply an introduction of a new staff member but requires effort on the reader’s part.**

Please introduce Tom at the weekly sales meeting. He is eager to work with your group. Your personal attention will help him quickly become a valued team member.

Joseph Wilson is from the technical support group and will greatly benefit from your tutelage on the finer points of blending selling skills with technical know-how.

- ▶ **Detail the information you want the reader to pass on the new employee. Emphasize those points essential for the reader to cover. Mention the reasons these points are important.**

We need Richard to learn our procedures as quickly as possible so you can concentrate on the changes necessary to meet our new sales quotas.

Make sure that Debbie understands that a close relationship with the service technicians is essential for this client in particular. Our contract is very specific about the level of service provided.

- ▶ **Provide some personal history on the new employee. This information can help the reader and the new rep feel more comfortable with each other.**

Caroline has considerable experience with our industry, most recently with Worldwide. We know you and she will discover many mutual clients.

Mark is from your hometown, Omaha, and also graduated from the University of Nebraska.

- ▶ **Show your appreciation for the reader’s efforts.**

I will personally appreciate your sponsorship of Edward.

Rapid growth is always difficult but you make it look easy. Thanks!

Request to Tutor Rep

Memorandum

TO:

FROM:

DATE:

SUBJECT: Welcoming a New Member to the Team

I need your help introducing Jennifer Wilson, our new sales rep, to California One. You as a fellow rep are in a unique position to help Jennifer feel welcome, begin to be a part of the team, find the resources to do her job, and have the human support she needs.

Just for your background information about what's needed, we have already scheduled her for the orientation mandated by administration. This meeting will present a broad overview of California One, touching on its history, structure, products, programs, policies, and philosophies. Most new reps find this helpful and enlightening. However, your help provides that "human relations" touch so necessary to new employees' emotional outlook on the job.

I have asked her to drop by my office at 8:30 a.m. on June 4 before the sales meeting opens at 9:00 a.m. Would you be able to arrange your schedule to meet her then? If not, let me know and I'll set up another time during the two-day meeting that is convenient to both of you. After that initial meeting, I'll let you two work out the details of the specific kind of support you can give.

Jennifer has five years' sales experience with SailNet. Her technical knowledge of the product has been gained through years spent as a technical support specialist before moving to sales. As a graduate from Penn State, she has a few stories to tell from there. She and her husband have recently moved to our area from Pittsburgh.

I've enclosed a "tutor checklist" to help you meet the needs of your new "understudy" by giving her the support she needs to quickly become a productive member of your team. Thank you for your important help in this orientation process.

Thank You for Special Training: Guidelines and Alternate Phrases

- ▶ **Identify the training you received immediately.**

The personal motivation class at the SPE Convention was the highlight of the week.

The one-day service seminar was quite useful. We will be able to sell more service contracts because we are better prepared to demonstrate their cost effectiveness.

- ▶ **Evaluate the training objectively. In addition to commenting on personal benefit, critique the course as it might benefit others: Did the course meet stated objectives? Was the material slanted to the appropriate audience? How knowledgeable, prepared, articulate, or organized was the instructor? What methods did the instructor employ—lecture, role play, or multi-media? Were there adequate opportunities for class questions? Did discussions center around theory or application? Were there handouts, books, or complimentary memberships that will be of future benefit?**

This training session was one of the best I've attended. The smaller classroom was very beneficial to establishing a quick rapport between the instructor and the students. The graphics were outstanding, the discussion lively, and the handout informative. It was well worth the time!

Many training classes are so repetitious that they lack impact. This class was different. It was brief, very focused on the objective, and well presented.

- ▶ **Make a judgment about sending others if you were a first-time attendee from your department or company. In other words, "interpret" your critique. If the course or seminar was beneficial, was it beneficial enough for your supervisor to send others? Should the training be mandatory for all employees handling related responsibilities? Or do you consider the training relatively insignificant for your particular job assignment?**

- ▶ **Thank the reader for providing you with the training.**

Every sales rep in the region would benefit from this class. Thank you for providing me the opportunity to attend.

I want to express my appreciation for the invitation to the Southwest Management Conference. The focus groups provided excellent techniques for those of us new to supervisory positions and provided opportunities to share experiences with veteran supervisors.

Thank you for having confidence in my ability to develop my selling skills.

Thank You for Special Training

Memorandum

TO:

FROM:

DATE:

SUBJECT: 10th Annual AMSE Management Conference in Seattle Last Week

One of the sessions I attended last week at the 10th Annual AMSE Management Conference in Seattle was entitled "Personal Effectiveness." The speaker shared several ideas that I want to pass on for possible use at Consolidated Services:

- Support Service: ...
- Paperwork Productivity: ...
- Market Penetration: ...

After several such sessions, I feel good about what we're doing here at Consolidated. For the most part, we're ahead of our competition.

I also had the recurring thought that most of our sales reps would have done a better job of this conference's presentations than some of those chosen. Nevertheless, I picked up several sales "gems" for my personal use.

Thank you for the opportunity to attend such professional meetings; I value your investment in this regard as an indication of my value to the company and your interest in my individual career.

I'll be pleased to discuss any of the above ideas with you in more detail.

Welcoming a New Sales Rep in Your Organization: Guidelines and Alternate Phrases

- ▶ **Show pleasure at the prospective employee's decision to join the firm. Show sincere enthusiasm and confidence in the employee.**

Jack, we're thrilled that you're casting your lot with us.

We were so pleased to learn that you had accepted the job offer here.

We are so pleased to hear you will be joining us shortly in Sarasota.

Welcome aboard. We can't wait until you get here to help us call the shots.

We're looking forward to having you join us next month. There are many who spoke with you during the times you visited who are eager to have you on the team.

We've been so proud to announce to our clients that you will be joining our staff August 1.

We've made the right decision in offering you a position here, and you've certainly made the right decision in accepting our challenge. We can hardly wait to have you aboard and working on the challenges that face us in the coming months.

The other members of our management team and I want to formally welcome you to the organization. We continue to appreciate your past accomplishments elsewhere and are expecting equally good things here.

- ▶ **Make the reader feel good about the decision to join the staff, with gentle reminders about the challenges and rewards of the future. You may make complimentary remarks about the people in the organization, the organization's past successes, or the abilities and experience of the new employee.**

Our Sarasota location has lagged behind our other divisions for two years now, and we're looking forward to your turning things around there.

Your smile and energy will be a welcome addition to the front office and customer counter.

Your enthusiasm and expertise make a package that will be difficult to beat during the upcoming months.

Your sales quotas will present both a challenge and a sense of great accomplishment as you bring new accounts to the organization.

Welcoming a New Sales Rep in Your Organization (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Richard:

Welcome to your new assignment as account rep in the Major Accounts Division and congratulations on joining our team! We are confident that your abilities will be put to good use here and that you will find your new job both challenging and satisfying.

To help you in the transition to your new job, John Hawkins, another sales rep in your region, will serve as your sponsor. A letter from him, along with information about our division and a welcome packet, is enclosed. Please feel free to call him at 602-451-2400 with any questions you may have. He will greet you on your arrival at headquarters on September 1 and will help you get settled in your new job. You both should have ample opportunity to share “war stories” before you take to the field.

Cordially,

Welcoming a New Sales Rep in Your Organization (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Kimberly:

Congratulations on joining the staff at Magnum Products. I hope you're as excited by the opportunities here as we are enthusiastic about what you bring to the job. No doubt you also face a certain amount of trauma as you anticipate living and working in a new place.

I know that your new supervisor, Marie Meeks, will assist you in numerous ways as you make your transition. In addition, I want to provide you with an orientation designed to familiarize you with Magnum's policies and procedures that govern our work here. Administration prefers that this orientation be completed within the first three days of your employment. Accordingly, we have scheduled your orientation for Wednesday, June 3 at San Diego headquarters. Please call me collect to confirm these dates.

I am sending separately some materials that will introduce you to the local community and, I hope, make you feel "at home" sooner.

I look forward to working with you in the days ahead.

Sincerely,

Welcoming a New Sales Rep in Your Organization (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear John:

We are very pleased that you have accepted a sales rep position with Anderson Mitchell in our Houston office. We are currently enjoying a scurry of activity, and you should find the pace challenging!

As you know from your discussions with Jane Bennett, you will be working specifically with the First National Bank account. They have been doing business with us for almost 11 years and will not be at all timid in letting you know of their specific expectations. With you assigned to their account, we look forward to another great year there.

Enclosed is a package for completion of your physical exam, part of our employment procedure. Please take the entire package to the physician of your choice. You should take the physical examination ten days before you come to work because we must have our medical division's approval before you begin work.

Please report to our office here in Houston on the 45th floor of the Gulf Building, 1400 Main, on May 15 at 8:00 a.m..

We will look forward to seeing you. In the meantime, please call me collect at 713-781-1650 if you need any additional information or help with your move. (A list of local moving companies is attached.)

Cordially,

PART 5

CREDIT & COLLECTION LETTERS

77 READY-TO-USE LETTERS

Correcting Buyer's Billing Error: Guidelines and Alternate Phrases

▶ **Begin with a neutral statement of the topic.**

Thank you for your call today about your recent bill. We encourage customers to check with us on any accounting matter of concern to them.

Thank you for expressing your concerns to us about our recent billing.

We received your letter about the billing on the 8" outside-diameter pipe.

Thank you for writing us about the difficulty you've had with your credit card billing.

As you know, it is extremely rare that our customers make mistakes, but I think in this case there has been some oversight.

▶ **Furnish facts and proof from your records.**

Of course, over the years we have made our share of mistakes, but in this situation, I don't think we goofed. Our records show...

We were most happy to review your account to discover any errors on our part. However, we didn't find such to be the case this time. According to our files,...

We have had another representative review your file, and she did verify the accuracy of the first bill. She has enclosed a copy of all the pertinent orders from your file so you can again verify the figures. We hope this will answer all your concerns about the items in question.

▶ **Ask the customer to notify you again if there are any other circumstances or documentation that he or she failed to mention in first writing or phoning you.**

We will be happy to make a more thorough investigation if, after reviewing the enclosed three months' billing information, you still have questions.

If, for some reason, we do not have all the facts, please forward the missing information to us so we can again check on the situation.

Please let us know if we have misunderstood the questions and concerns you had about your billing.

▶ **Suggest any other alternatives to meet the reader's needs or redress the issues.**

We feel your company is liable for this amount under the new taxing regulations. However, if you think the amount warrants further action, you may try to recoup the money from the State of Tennessee through a tax credit.

Perhaps you may want to seek reimbursement from the vendor who made the warranty claims.

Perhaps an outside consultant can be more helpful in providing a solution to the problem with the damaged equipment.

Buyer's Error (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Thompson:

We received your letter saying you had not received your shipment of office supplies but had received our invoice #5889 for \$348. After reviewing your order form, we have discovered the artwork for the logo to be engraved on the binders was not included with your original order. A note attached to that order stated that the artwork was to be sent from your office "shortly," but we have never received it—thus the delay in processing your complete order.

As soon as you are able to provide us with the artwork, we will process your order and ship all your merchandise within five working days. If you prefer we ship the other office supplies separately without the binders, please let us know (1-800-456-7890), and we will process that portion of the order immediately.

We appreciate your continued business.

Sincerely,

Buyer's Error (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Morris:

Your inquiry concerning our current bill to you has been forwarded to me for handling. After reviewing your account, we have determined the use of electricity in your home seems to be within the normal pattern. We can find no evidence of an error having been made and believe the bill is correct as stated.

We are appreciative of your business and are trying to keep costs as low as possible for our customers.

Sincerely,

Buyer's Error (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Bonnette:

We have rechecked your bill for service to May 31, using as a guide the information you sent us about your purchases. With that information, we still find your account balance to be correct at \$2,244.

The \$766.86 purchase you returned for credit was reflected on last month's statement. Perhaps you did not check that previous billing record.

In reviewing your account we also found we had erroneously calculated the interest to be \$28 rather than \$38. But because we have inconvenienced you in making this interest error, please forget the extra \$10 owed us, and we will call things "even."

We appreciate your business.

Sincerely,

Correcting Seller's Billing Error: Guidelines and Alternate Phrases

▶ State how you've corrected the error.

Enclosed is your copy of the corrected deposit slip for \$500. It reflects your correct account number (233444) and the original deposit date of October 16, 20--.

We have reviewed the questions you raised about your account and have found we made an error. We have, therefore, made the appropriate adjustments and enclosed a corrected bill.

▶ Explain briefly how the mistake occurred.

The error was made when our clerk manually recorded your checking account deposit to another account.

The new sales representative was unaware of the extra charges for such expedited processing and shipping.

▶ Express regret for the buyer's inconvenience and make your apology appropriate to the seriousness of the error.

We are sorry for the mistake and want to assure you no checks were returned because your balance remained positive even without the unrecorded deposit.

We know you were greatly inconvenienced in having to make two trips to our office to supply the paperwork we needed to correct the situation. We sincerely apologize for your trouble and lost time.

▶ Mention any extra effort you have extended to show your regrets.

After we completed your order form over the phone and then checked with our supplier, we discovered he no longer distributes the particular model you wanted. To get that model, we will order from a new vendor. The price will be \$228.45. Do you still want us to process your order?

In an effort to make up for the anxiety the error caused, we've deleted the \$10 service charge on your original billing.

Because your original order was delayed, we have tried to accommodate your needs by shipping the merchandise overnight express at our expense.

We have enclosed a little gift, one of our newest digital alarms, to show our regret in having made this error. Please accept it with our apologies.

▶ **Close positively, with a business-as-usual tone.**

We look forward to servicing all your future needs.

We look forward to hearing from you again and are eager to improve our service to you.

We value your account and hope your questions have been answered satisfactorily. If not, however, please let us know.

Thank you for allowing us to serve your needs.

Thank you for doing business with us.

We hope you enjoy the closet rack.

Seller's Error (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Trayvert:

Upon researching your account with our bank, we find you have a credit balance of \$432.88. Because your account has been closed since January 4, we are sending the attached cashier's check to clear this credit from our files.

We have appreciated your past business, and, should you return to our area, we would be pleased to serve you again.

Sincerely,

Seller's Error (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Speck:

It's regrettable when mistakes are made, and this happens to be one time when we owe you an explanation and an apology.

Invoice #45621 for \$5,667.34 has just been billed to your account after almost a year's delay. We have attached a copy of the invoice, along with the proof-of-delivery documents.

Somehow the paperwork on your order was buried in our records and then was incorrectly billed to another account. It wasn't until the other customer called the error to our attention that we became aware of the mix-up.

With the \$3,334 credit appearing in your account as of January 14, there is a balance due of \$2,333.34. Again, we are sorry for this delayed billing. Perhaps you were able to make good use of that money during this past year and won't be too upset at our oversight to bill you.

Please call us if you would like to discuss the matter further before sending your check.

Sincerely,

Seller's Error (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Hatten:

Please disregard the additional billing you just received from our office. The billing was in error, and the cause has now been corrected on our computer. Your account is clear.

Please accept our apologies for any momentary concern this may have caused you.

Sincerely,

Seller's Error (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Sheila:

I have enclosed the revised, corrected billing for the auto coverage with an effective date of February 1 rather than January 2. The down payment is \$2,660, and you will make seven monthly installments of \$922.33. The difference between the actual amount you paid in your returned January 29 check (\$3,440) and the down payment is \$780.

Please return the signed agreement, along with your new check for the down payment, to our office by February 10.

These rating changes were made after the original policy was delivered to you. Thank you for permitting us to provide your insurance coverage.

Sincerely,

Seller's Error (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Jackson:

In checking our equipment recently, we discovered the meter serving you has not been registering properly. Therefore, we have rebilled you for the months that are involved.

Attached is a statement showing the amount we originally billed you and the new, correct amount. Please note we have deducted all the payments you've made during the last few months from the total amount shown on the enclosed rebilling.

We regret the malfunctioning meter and apologize for the inconvenience of your having to write us another check for the difference. Thank you for your understanding and your business.

Sincerely,

Seller's Error (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Hargroves:

Thank you very much for bringing to our attention the computer billing problem. We will correct it immediately.

Sorry for the false alarm—you do not owe any money on your account. Please accept our apology for your trouble in having to write us.

Sincerely,

Seller's Error (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Connors:

We have received our statement from your bank assessing late charges and penalties on a loan we do not think warrants such charges.

On February 19, our check #234567 dated February 5 was returned to us with a letter stating the loan payment (loan #55666) was incorrect. Ms. Susan Smith at our office spoke with your service representative, Dana Martin, to explain this payment was a final amount (as stated on the check stub), and the amount was correct according to your payment schedule. Ms. Smith requested an itemized statement showing all unpaid late charges assessed to the account.

Ms. Martin from your office agreed to send a statement and instructed Ms. Smith to hold the check. For two weeks we have waited and received no further word from your office, and no one has returned our calls to Ms. Martin.

We feel because your bank returned our check and then your representative asked us to hold it until further instruction, the late charges for February and the penalty charges should be removed from the account balance.

Again, we ask you send us an itemized statement with unpaid late charges for the entire loan (240 months) so we may research, verify, and remit to your bank those late charges that have not been paid.

Very truly yours,

Pointing Out Billing Errors: Guidelines and Alternate Phrases

▶ **Point out the specific billing error and ask for immediate correction.**

We are returning these invoices to you for proper handling. Please let us know immediately how you plan to correct the error.

We ask that you correct the balance on the next billing cycle.

Would you please subtract the overpayment from our next month's charges?

Please return our check immediately. We will send a replacement check for the correct amount.

Please remove the \$456 charge from our account.

▶ **Give any information you can provide to help the reader investigate and verify the error.**

The 14-hour difference noted for John Q. Hill for invoice #23456 covering services for July appears to be a proration of sick-leave time. According to Article 6.3 of the contract, sick leave is a component of the 28 percent benefit factor and should not be billed as a direct service fee. We have included that article for your review.

Ms. Frankie Jones is the person with whom I spoke on August 6 about the problem. Perhaps she can locate the missing paperwork for your records.

▶ **Provide all dollar amounts, account numbers, dates, check numbers, and copies of previous correspondence.**

We hope these further details will help in your investigation of the error.

Attached is a copy of the returned check and the client's letter of instructions.

▶ **State the positive benefit to the seller in taking more care with the accuracy of the billing process.**

As I'm sure you're aware, the three incorrect billings for my last month's payment have probably cost your staff more to correct than the payment itself. Would you please give your personal attention to this on-going problem with my account? Thank you.

I hope for both of our sakes we can get this error corrected immediately.

I am most eager to get the matter corrected immediately. Will you please see what you can do to get things moving on your end before we both lose additional time and money on the problem?

Pointing Out Billing Errors (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Mason:

Today we received the Certificates of Insurance and invoices for our client, Belco Engineering, and discovered the client's name is misspelled on each document. As I'm sure you're aware, such certificates will be confusing to their holders and not legally binding in court, if questioned.

Therefore, please correct the misspelling on each certificate and invoice and reissue them to us. We are enclosing another list of all of the companies/jobs/sites, along with their complete addresses. The correct spelling is Belco Engineering, Inc.

Thank you for your cooperation in immediately correcting this error.

Sincerely,

Pointing Out Billing Errors (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Heinges:

As we discussed on the phone today, I have enclosed a copy of the bill for services rendered and paid for on January 5, 20-. My check #3445 for \$85.00 cleared on January 9 (a copy of that check is also enclosed).

Your March 1 call regarding my billing is the third such call in the past three months. If there is some billing or computer problem, I will appreciate your help in getting things worked out immediately so you and I both can devote our time to other projects.

Sincerely,

Pointing Out Billing Errors (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Hyde:

You currently have three outstanding invoices amounting to \$7,893.35 against your agreement, with no payment toward any of them.

Our policy is to cancel an agreement once three invoices have been generated with no payment. Unless we receive payment for the enclosed, past-due invoices within the next 10 days, we must cancel your line of credit.

Please let us hear from you so we can keep your credit line open and your records clear.

Sincerely,

Canceling Credit: Guidelines and Alternate Phrases

- ▶ **Summarize the poor credit history and situation in a tactful manner, including the unpaid balance.**

We show five unpaid invoices dating back to March of this year.

We have extended credit to your organization on three previous occasions for a total of \$6,300 and still have received no payment according to the terms to which you agreed.

For several months now, we have been trying to work with you to resolve the outstanding balance of \$890.34 on your account with us. We fear the situation is not improving for you or for us.

As you probably know, the balance of your loan has not been retired as we had agreed upon.

Sometimes we find we have opened the wrong kind of credit account for our customers. Because your outstanding balance (\$5,589) has been above the maximum agreed upon on our revolving account, we suggest discussing with you a more suitable purchasing arrangement.

- ▶ **Avoid an aggressive tone. Try to sound matter-of-fact or even positive, possibly suggesting the customer tell you if there's some mistake in your own records.**

If there is some mistake in our records, please call us.

If we do not hear from you with some further information, we will assume our understanding of the current situation is accurate.

Thank you for your understanding of our decision.

Please let us know if we have overlooked your payment on this loan.

- ▶ **Offer any alternative arrangement you will accept for future business and suggest some follow-up meeting or method to repay the balance. Be clear about your decision to terminate the current credit arrangement.**

If you can make prepayments on further orders, we will be happy to ship them immediately.

We will, of course, appreciate the opportunity to do business with you on a cash basis.

We cannot extend further credit and have closed your account. We are willing to work with you, however, to repay the unpaid balance over a longer time period.

Perhaps your local bank could assist you in a loan that would minimize the burden of such unpaid accounts. In any case, we have had to close your account with us until the situation changes.

We simply cannot extend credit any longer. Your account has been closed. We will be willing to change your repayment structure, however, so the monthly payments are lower and less burdensome.

Please come in at your convenience to discuss how we might help you make these payments on a more suitable schedule.

Let us know when you can come in, and we will be happy to work with you in making more appropriate arrangements.

Canceling Credit (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Tiedt:

I have not received any response from you to my May 2 letter. Our records show your account is still delinquent in the amount of \$782. Your credit agreement requires all balances be fully paid within 30 days.

While I can sympathize with your situation, you understand we must also keep our records current to meet our own obligations. If necessary, I suggest you talk to your bank about a loan to cover the payment to us. This may protect your credit rating and future freedom to purchase products and services in the community. In any case, we find we can no longer extend credit to you.

Thank you for your past business, and when your situation improves, we hope you will again consider our products.

Sincerely,

Canceling Credit (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Samson:

We note during the past 12 months your account balance at the end of each billing cycle has remained above the agreed-upon credit terms. To date, your outstanding balance is \$1,899. The 60-day past-due amount is \$1,200.38.

We suggest, therefore, we determine some other buying arrangement to alleviate that potentially damaging credit situation. Because we will be forced to cancel the current credit arrangement with this next October billing cycle, we ask you come in to discuss with us the unpaid balance and permit us to help you work out a more suitable payment schedule.

If our records are in error, of course, please let us know immediately. We will be happy to arrange a meeting at your convenience.

Sincerely,

Canceling Credit (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Tommes:

We appreciate your continued interest in our products. But as we have reviewed our records, we have discovered your recent pattern of payment has been rather irregular. In fact, your payment record no longer meets our terms for extending credit.

We realize a continuing economic downturn has taken its toll on many businesses in the area. Perhaps your industry has experienced such a problem, and your situation is only temporary. If that is the case, please let us know and we will be glad to review the situation again next year.

In the meantime, we hope we can continue to do business with you on a cash basis. If not, please consider us again for the future.

Sincerely,

Canceling Credit (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Smith:

We have reviewed your account and decided, with reluctance, we can no longer continue our credit terms to you. We wish we could help you through this difficult time, but we simply can't because the health of our own business is at stake.

We hope your situation improves. Please let us know when you can again satisfy our credit requirements.

Thank you for the opportunity to serve you in the past.

Sincerely,

Canceling Credit (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Smith:

We have reviewed your account and decided, with reluctance, we can no longer continue our credit terms to you. We wish we could help you through this difficult time, but we simply can't because the health of our own business is at stake.

We hope your situation improves. Please let us know when you can again satisfy our credit requirements.

Thank you for the opportunity to serve you in the past.

Sincerely,

Collection Letters: Guidelines and Alternate Phrases

▶ **Ask for payment of the specific amount immediately.**

We are writing to remind you of an unpaid balance of \$245.57 on your account.

The outstanding balance on your revolving credit account with us is \$899.55. We ask you please remit the minimum amount of \$89 immediately.

May we have your check for \$860 by return mail?

▶ **Adopt a neutral tone on the first notice, gradually getting stronger with each letter. Your first letters are simply reminders—your own records could be in error or your invoice may have gone astray; you don't want to anger customers unnecessarily. If it becomes necessary to write again, you should inquire about the reasons for the late payment. On subsequent letters, you may resort to an appeal to the reader to contact you and make some attempt at even partial repayment. Finally, you must demand payment in lieu of further legal action. In other words, your letters should remind, then inquire, then appeal, then demand.**

▶ **Make the response simple—give all the necessary details, include a return envelope, and provide a name and phone number for questions or explanations (if these are not already on your letterhead).**

Won't you phone Susan Deckendorf at 345-5590 and explain why we haven't received your payment?

Please take a moment to jot us a note on the bottom of the enclosed invoice, explaining your situation.

We have provided a stamped envelope and a checklist for your explanation about this outstanding account. Please let us hear from you as to how we might work out a payment schedule suitable to your needs.

▶ **Put the burden of communication and explanation on the reader.**

You have not called us to let us know of your specific situation and any difficulties of which we should be aware.

We have not heard from you about the payment.

We have received no response from you to our recent letters asking about payment.

You have not returned our calls to let us know when we can expect payment.

You will, I'm sure, want to protect your credit rating.

If we do not hear from you within the next five days, your silence will force us to...

You have made no effort to settle the matter or even to give us an explanation.

Casual Reminders (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Steem:

Just a reminder your account at the Hotel St. Agnes is now due in the amount of \$224.33. We would appreciate your attention to this matter, and if your check has crossed this letter in the mail, please accept our thanks.

Sincerely,

Casual Reminders (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mrs. Shaw:

We are writing to call your attention to a past-due bill you may have overlooked. Your account shows a balance due of \$498.22 for dental work done on June 6.

A self-addressed envelope is enclosed for your convenience. We have been happy to serve you.

Sincerely,

Casual Reminders (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Birnbach:

After posting all payments received through August 1, we show no record of having received your check for \$922.28, which was due on July 3. If our letter and your check have crossed in the mail, please ignore this reminder.

A printout of items we show as unpaid is attached. If you have not yet sent your payment, please do so now.

Yours truly,

Casual Reminders (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Steine:

We appreciate your call in response to our last reminder about the overdue balance on your account. Our records indicate your check #2624 dated Oct. 4 for \$250.00 for our invoices #1369 and #2699 has not been received.

Would you please assist us by verifying with your bank that this check has cleared? If it has, please forward a photocopy (front and back) to me. If it has not cleared, please send a replacement check.

Thank you for following up on this matter.

Sincerely,

Casual Reminders (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Thorstenson:

Just a short note to confirm our conversation of May 6 concerning your past-due account. You agreed to the following:

- Pay \$2,000 immediately (payment to arrive in our office no later than April 15)
- Pay the balance of your monthly payment of \$325 by May 30
- Pay your total monthly payment of \$782 by June 30
- Pay your total monthly payment of \$782 by the 20th of each month without interruption

I trust you are on schedule and will be able to meet the above commitments as indicated in our conversation.

Regards,

Casual Reminders (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Sharron:

Thank you for your recent payment on invoice #681955 for \$6,420, leaving an outstanding balance of \$2,125 on this account.

If the reason for the short payment was tax, please forward a copy of the appropriate tax certificate to my attention. We can reconcile this account only upon receipt and verification of tax-exempt status.

We'll appreciate your cooperation in clearing this outstanding balance.

Sincerely,

Casual Reminders (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Sharron:

Thank you for your recent payment on invoice #681955 for \$6,420, leaving an outstanding balance of \$2,125 on this account.

If the reason for the short payment was tax, please forward a copy of the appropriate tax certificate to my attention. We can reconcile this account only upon receipt and verification of tax-exempt status.

We'll appreciate your cooperation in clearing this outstanding balance.

Sincerely,

Casual Reminders (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Kline:

Attached is a statement of items we show to be unpaid as of March 1 and past due on your account. Please review our statement for accuracy and let us know of any discrepancies.

If there are no problems associated with these items, we request you expedite your payment to us within the next 10 working days. Thank you.

Sincerely,

Casual Reminders (Example 9)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Gomez:

We recently received your payment on our invoice #12134958 for \$622.58, which results in an amount still owing of \$320.62.

Attached for your review is a photocopy of this invoice.

We will appreciate your cooperation in clearing up the remaining balance.

Sincerely,

Casual Reminders (Example 10)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Sheldon:

Please see the attached copy of the Proof of Delivery requested on our invoice #99826. I have also attached a photocopy of the invoice for your review.

We ask that you process this invoice for payment immediately.

Yours truly,

Casual Reminders (Example 11)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Gish:

Your check #926 dated June 6 for \$792 has been returned unpaid by your bank. Once it has been returned, we cannot resubmit your check for payment. Therefore, we must ask you make arrangements to replace this check with a cashier's check or money order within five days.

While we trust the return of this check was only an unintentional accounting oversight, we are required to advise you there will be a \$20 charge for any checks returned in the future.

Please return your remittance in the enclosed envelope to my attention.

Yours truly,

Stronger Reminders (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Gackenbach:

Despite several previous collection attempts, we still have not received your last three payments, for a total of \$1,892.68.

We view this as a serious breach of your purchase obligation. If full payment is not received immediately, we may be forced to seek recourse as provided for under the terms of the agreement.

Sincerely,

Stronger Reminders (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Dennis:

In late January, we wrote you about the shared cost of the refreshments at the Seneca Lakes marketing seminar and reception, jointly sponsored by you and the Marketing Survey Group. Each company's portion of these expenses for the meeting was \$248.

To date, we have not received your company's check. We would appreciate your help in covering this expense. Please forward the check to my attention in the enclosed envelope.

Yours truly,

Stronger Reminders (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Jahns:

As we discussed by phone, according to company policy, employees terminating employment prior to their service date must reimburse the company for vacation days taken but not yet earned. Our records reflect your last day of employment was February 1, 20-. Since your service date was November 11, 20-, you will need to reimburse the company for nine vacation days taken in January.

Please remit to my attention in the enclosed envelope \$966.44 by sending a personal check payable to Universo Limited. We need your payment by June 5.

Sincerely,

Stronger Reminders (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Asner:

To date, we still have not received your payment for the \$468 owed us on your account. Would you please check on the matter immediately and let us know what has happened?

Sincerely,

Stronger Reminders (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Smarmout:

I want to follow up our recent telephone conversation reminding you of our terms of sale and payment due dates. Your account now has an outstanding balance of \$2,380, which is 90 days past due.

We have provided you an invoice for each purchase, and that invoice states the date payment is due in our office. Additionally, we send a monthly statement detailing all unpaid items. Your cooperation in remitting payment according to these agreed-upon terms is essential in continuing to do business with us.

It is my understanding your account is set up on our TIB program whereby you can have the money wired from your bank account to ours. If you are having a problem with the program, please let us know.

We want to continue serving you on a credit basis; however, we need your cooperation. Therefore, we strongly urge you to remit payment according to the terms we agreed upon.

Thank you.

Yours truly,

Stronger Reminders (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Jeffries:

Several attempts have been made to reach a resolution for the open invoice on your account now totaling \$3,280. Due to the extreme delinquency of your account, we must have payment in full within ten days from the date of this letter.

If we do not receive payment, we will pursue any avenue available to secure our interest.

Sincerely,

Stronger Reminders (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Buschmann:

We recently sent you a reminder that your payment of \$829.45 had not been received. As of Oct. 1, we have received neither your payment nor a reply.

Perhaps our previous letter was unintentionally overlooked or went astray in the mail. In either case, your account is now several weeks past due. If you have not already done so, please send your remittance today.

Sincerely,

Stronger Reminders (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Ta Hong:

As you have requested, another copy of your September 5 invoice is enclosed.

Should there be any reason why this invoice cannot be processed for payment, please contact me immediately at 456-9986.

Sincerely,

Stronger Reminders (Example 9)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Ouellette:

As of January 31, we have received no response on our previous requests regarding the short payment on invoice #987544.

Since this invoice is now past our terms of net 30 days, please remit your check today.

Sincerely,

Stronger Reminders (Example 10)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Figurski:

We received your check for \$426.99 on Dec. 1. While we thank you for the payment, we want to remind you that your purchase agreement requires all minimum balances be paid monthly. Our records indicate you remain delinquent in the payment of \$668.22.

Please mail your check for \$668.22 within the next five working days.

Sincerely,

Stronger Reminders (Example 11)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Hull-Ryde:

We wrote you on March 15 regarding the \$728.66 payment that, according to our records, has been past due for 30 days. As of today's date, we are still showing the items on the attached report to be outstanding.

If you have not already done so, we ask that you please take care of these charges now. If further action is required on our part to expedite payment, please contact me or my assistant, Joan Hughes, at 449-5526.

Sincerely,

Stronger Reminders (Example 12)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Tamasy:

On April 2, I wrote you a letter detailing all of the services I'd performed on your behalf regarding the potential claim against Orfin Corporation.

I am at a loss to understand why I have not heard from you about the payment due. Please let me know immediately if there was some problem with the services I rendered. Otherwise, I will appreciate your remitting my \$450 legal fee at once. Again, your file is available for your review if you have questions.

Very truly yours,

Stronger Reminders (Example 13)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Miller:

We want to call attention to the \$245.69 unpaid balance on your account with us. Would you please forward that amount immediately in the enclosed envelope?

Thank you.

Appeal for Discussion (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Warella:

Are our records in error? We show your last payment of \$428 is past due. According to the terms set forth in your purchase agreement, payment was due August 1. Payments received through July 31 have been credited to your account. A printout of the items we show to be delinquent is attached for your review.

If our information is incorrect, please contact me so I can properly credit your account. If you have not yet sent your payment, please do so today.

Sincerely,

Appeal for Discussion (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Scherf:

I understand from our phone conversation of April 22 and my further discussions with your accounts payable department that your company pays invoices on a 55-day cycle. Brighton consumer payment agreements have a net term of 30 days, with discounts allowed for early payment. Thus, your account has consistently been past due 30-60 days, and in some cases, 90 days.

The discounts are two percent for Electronic Funds Transfer prompt payment and one percent for payment received on or before the 15th day following the invoice reference date. A late payment charge is assessed if payment is received beyond the 30-day net period.

I'm enclosing some information on Electronic Funds Transfer (EFT) that you may find helpful in deciding how best to meet the terms of your consumer payment agreement. I hope we can work together to eliminate the past-due balances and to keep payments within Brighton's 30-day guidelines.

Sincerely,

Appeal for Discussion (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Sawai:

The enclosed invoices are 60 days delinquent.

Please review your records and let me know if there is a problem with approval on these invoices. Otherwise, we would appreciate your putting these items through for immediate payment.

If you need additional data, please call me at 321-4444.

Thank you for your immediate attention to this balance.

Sincerely,

Appeal for Discussion (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mrs. Jernigan:

Our records indicate the following invoices have not been paid and are past due as of July 31:

Invoice #	Date	PO #	Amount
------------------	-------------	-------------	---------------

(insert data)

Should you have any reason for withholding payment on these invoices, please let us know immediately so we may assist you in clearing these items promptly.

If no problems exist, we would appreciate payment by return mail at (address).

Thank you.

Sincerely,

Appeal for Discussion (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Luck:

Your fifth monthly payment of \$426.98 is now due, and our records show you are two months delinquent in payments for a total past due of \$1,280.94. Your purchase agreement requires your payment due on the 14th day of each month.

We are concerned that you have allowed this situation to develop. Unless payment is already en route, we must insist you pay the delinquent payments within five working days of receipt of this letter. Failure to do so will be considered a serious breach of your purchase agreement.

If you have any questions regarding this matter, please contact me or my assistant, Ted Aimes, at ext. 2977.

Sincerely,

Appeal for Discussion (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Barnes:

We are surprised we have not heard from you about the unpaid \$988 on your account with our company. The balance is long overdue, and we have had no explanation from you in response to our earlier letters.

Please let us hear from you immediately about your plans for payment. We have provided a space at the bottom of this letter for your convenience in replying.

Sincerely,

Appeal for Discussion (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Whitaker:

We have not had a response from you about the unpaid balance of \$2,300 on your company's account with us.

If you cannot put a check for the full amount in the return envelope, won't you please call us to discuss a more suitable arrangement for payment? We are eager to learn the facts of your situation.

Sincerely,

Appeal for Discussion (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Smith:

While we can't understand your nonpayment of the overdue account of \$1,800.34 for consulting services rendered your company in January, we do once again urge you to let us hear from you. Would you call Bob Metcalf at 123-4567 for an appointment next week?

Perhaps if we talk, we can work out an appropriate payment schedule. We hope you will be so courteous as to phone us by the end of the week.

Sincerely,

Urgent Demand (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Jarzynka:

I can find no record of your response to my May 6 letter concerning your check #2832 for \$789.62, which your bank refused to honor. The amount is seriously delinquent and must be paid **immediately!**

To avoid further action, your payment by cashier's check must be received in my office by August 1. A pre-addressed envelope is enclosed for your payment.

Sincerely,

Urgent Demand (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Guardsmitz:

In discussing the July 6 letter to me regarding Mr. Bruce's claim for the attached invoices, Mr. Bruce has indicated, unless we can resolve this matter in some reasonably short timeframe, I should institute suit on the matter.

Certainly, your original letter did state you intended to return the equipment you removed from his shop on November 5. But you have neither returned the equipment nor paid his invoices, despite his many requests to hear from you.

Unless a reasonable effort is made on your part to pay Mr. Bruce for the equipment within the next 14 days, he has authorized me to file suit in the proper court and pursue judgment against you.

I will appreciate your immediate action.

Very truly yours,

Urgent Demand (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Gwynn:

Despite our previous collection letters and conversations, I find you have made no progress in bringing your payments current, and in fact are now delinquent in three months' payments totaling \$3,106.

I am aware of your situation, and while I sympathize, under no circumstance could I consider your check for \$200 as adequate evidence of "good faith" efforts to retire this delinquency.

Demand is hereby made upon you for the immediate payment of \$3,106. The attached printout lists charges remaining unpaid as of September 30. If payment in full is not received in my office by Monday, October 12, I see no alternative other than to recommend you be sent the legally required notice of default and, thereafter, we initiate such legal action as is required to fully collect the monies due under our purchase agreement.

Yours very truly,

Urgent Demand (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Callesen:

Once again we find it necessary to write you about the seriously delinquent nature of your payments. Our records show you have not made the last three payments and still owe us for several invoices billed in June. The total past due as of today's date is \$6,202.64.

In fact, our records show you have been in an almost constant state of delinquency this entire year. To be quite frank, our patience is at an end. Unless the entire \$6,202.64 is paid before year's end, we intend to apply full legal pressure against you to enforce payment.

I sincerely hope such unpleasantness can be avoided, and you can make the necessary financial arrangements to bring your account up to date. The decision is yours.

Sincerely,

Urgent Demand (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Gaerty:

Your check #9264 dated May 10 for \$2,192.68 has been returned unpaid by your bank.

Because you have previously had checks returned for insufficient funds and have been advised of the fee for subsequent returned checks, we must assess a charge of \$20 to offset our costs in re-processing your payment.

We now make formal demand of you for the payment (by **cashier's check** or **money order**) of \$2,192.68 plus the NSF check fee of \$20 within 10 days of receipt of this letter. Further, we can no longer honor your company checks and can accept only cashier's checks or money orders. After 10 days, outstanding NSF checks may be referred for collection to the District Attorney's office without notice.

Please send your payment now to my attention at the address listed above.

Sincerely,

Urgent Demand (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Jones:

We regret we must again remind you that your account with the Hotel St. Agnes is delinquent in the amount of \$2,344.50.

We must insist you give this matter your immediate attention because we would like to protect your credit rating.

Enclosed is a return envelope for your immediate payment or explanation.

Yours truly,

Urgent Demand (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Frank:

You purchased a computer and several peripherals from us back in February. We set up credit terms with you as you requested, with your final payment due April 30. Now five months later, your account balance still shows \$4,845 outstanding. You have not informed us of any problem with the equipment, and we, therefore, assume it was delivered and is operating satisfactorily.

You have not responded to our earlier five letters about the overdue payment and have not returned my three phone calls to your office (8/4, 8/9, and 9/6). Without any communication or explanation from you, we have no choice but to turn the matter over to our collection agency.

We've hesitated to do this previously because we know—and I'm sure you're aware of—what this can do to a company's standing in the community.

We're hoping you'll help us avoid such an action by sending us the full payment by September 30. After that date, we will proceed with the further action I've outlined.

Very truly yours,

Urgent Demand (Example 8)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Hornsby:

This note is our final request for payment for the overdue balance of \$3,223 on your account. Unless we hear from you by May 5, we will turn the account over to our legal department for further action.

Yours truly,

Investigations: Guidelines and Alternate Phrases

- ▶ **Ask for the credit information immediately. If you are writing to a third party, state that the credit applicant has given the reader as a reference.**

Bob Jones has asked we contact you for verification of his credit records.

Would you help us with credit information on Ms. Cecelia James? She has suggested we contact you about her credit history with your organization.

We are gathering financial information about Garth-Heath and Associates, and the company has referred us to you.

We will appreciate any financial information you can supply us about Mr. John Brown, who has applied for a loan with us and has given your name as a reference.

Would you please supply us with any information about the financial responsibilities of Georgette Adams to help us decide on the amount of credit to extend to her? She has given us your name as a reference.

- ▶ **State specifically what information you want.**

Would you give us details about the promptness of his last six payments?

Can you give us the amount still owed your organization and the average monthly outstanding balance?

We need these documents from you: 1)

The loan she is requesting amounts to \$28,000. What is your opinion about her ability to repay this amount?

We would appreciate a copy of her last year's account with your company.

We need a profit and loss statement and a signed Note of Agreement form from you to help us determine the company's current financial situation.

Can you tell us the length of time Ms. Brown has had an account with your bank? What is the average balance? Are there outstanding loans? If so, what is the nature of her collateral?

- ▶ **Make the response easy. Suggest a phone call or a margin note on the bottom of your letter, or supply a form and a return envelope.**

Please respond by completing the attached form and slipping it into the enclosed postage-paid envelope.

Simply jot us your answers in the margin and return our letter in the enclosed envelope.

If a phone call is easier for you, please ask for Joanne Summers at 325-444-0987.

The enclosed form is for your convenience in providing us this information.

We have enclosed a questionnaire we hope will help you in your reply.

A checklist is enclosed for your response to our questions about Ms. Krueger's credit record.

- ▶ **Promise confidentiality.**

We will, of course, keep any information you provide confidential.

This information will not leave our offices.

This information is for our use only, of course, and the customer will not be privy to your comments.

We can assure you this information will remain confidential.

We will, of course, keep the information in-house and strictly confidential. We appreciate your help.

Such information is for our own use and will not leave my office. Thank you for your cooperation.

Investigations (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Gentlemen or Ladies:

Garth-Heath and Associates, located at 22233 Riverside Drive, has asked to open an account with us, and the company has given your name as a reference.

Their first order of supplies will amount to approximately \$2,300. Can you give us any financial information concerning this company's reputation for prompt payment of credit accounts? What are the credit terms and lending limits this company has with you? We have enclosed a form for your convenience in reply.

We will, of course, keep the information you provide strictly confidential.

Thank you for your help in this matter.

Sincerely,

Investigations (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Ladies or Gentlemen:

MacNult and Associates has asked to open a credit account with us and has given your name as a reference.

Would you please help us with some credit information on this organization? Has this company been prompt in their payments to you? What is their credit limit? What other information do you have about their history that might help us determine their ability to repay an account of approximately \$56,000?

We, of course, will keep any details you can give us completely confidential. Thank you for your willingness to share this information in serving our mutual customer.

Sincerely,

Investigations (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Smith:

We are pleased you have decided to purchase our telephone equipment. To work out the credit terms you have requested, we need some additional information from you. Would you please forward to us:

- last quarter's profit and loss statement
- certificate of ownership of the business
- the completed, enclosed Form 234 listing business credit references and the financial institutions with which you do business

We will be eager to expedite your order as soon as we have the above information on hand. And, of course, the information you provide will remain confidential.

Thank you for your interest in our products, and we look forward to doing business with you.

Sincerely,

Investigations (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Buell:

In our recent attempts to reconcile our investment system to the bank statements, we discovered we did not have sufficient information. We have been able to reconcile all security types except collateralized mortgage obligations. We need the bank to provide us with a supplemental statement each month that will reflect this information.

I've talked to several people in Treasury and have been unable to resolve this problem from my position. Consequently, I need for you to please help me by requesting from your own contact at the bank this additional information.

Collateralized mortgage obligations are unique because these security types frequently have unscheduled prepayments of principal. However, these prepayments are not reflected in the bank's monthly statement.

A draft letter is attached as a model; feel free to use this one or your own.

Sincerely,

Investigations (Example 5)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Jack:

In reviewing my confidential work file on your account in anticipation of our visit next week, I noticed the most recent financial statements for you and your company are more than a year old. In accordance with our lending policy requiring all unsecured credit facilities be supported by financial statements less than a year old, I will appreciate your providing me with updated statements.

As in the past, these financial statements will be retained in my confidential work file and will not be routed to the general credit files of the bank.

To assist you in the preparation of the documents, I have enclosed copies of the most recent information in my possession. Given the bank's increased emphasis on cash flow, I need any information you can provide me concerning the revenues and expenses associated with the assets reflected on the statements.

Jack, Drummond Bank is very appreciative of the business we have done together over the years; personally, I can't think of a relationship I have enjoyed more. Please let me know if there is anything I can do to assist you in your banking needs.

Cordially,

Investigations (Example 6)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Cox:

A review of our files indicates we have not received the year-end 20– financial data for your company. Therefore, we would appreciate your sending us your latest statements.

In the event you issue interim statements, we would also like to receive them on an ongoing basis. If, for some reason, financial data are not available, please let us know. Would you also place our name on your mailing list to receive future reports as they become available?

Thank you for forwarding these statements to us so we can continue your credit line without disruption.

Sincerely,

Investigations (Example 7)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Fritterbux:

We want to take this opportunity to thank you for your patronage. In an effort to serve our valued customers better, we are attempting to extend the maximum credit limit permissible for your purchases here. Would you help us by supplying the following information:

- Bank references, account numbers, addresses
- Trade references, account numbers, addresses
- Financial statements
- Statement of Exemption and Current Tax Status

The above information will be kept confidential. Thank you.

Sincerely,

Offering Credit: Guidelines and Alternate Phrases

▶ Tell the reader you are extending credit.

We are pleased to tell you our investigation has verified your fine credit standing, and we are happy to open an account for you.

We will be opening an account for you immediately; your credit history is exemplary.

Today International Engineering and Equipment has approved your credit line for \$300,000, based on the financial information you provided us, dated March 9, 20–.

We are happy to extend credit to you for the purchase of the software packages you have ordered.

We have received replies from all your credit references and are pleased to find them all very satisfactory.

Thank you for permitting us to check your credit references. We find you have an excellent credit history, and we are eager to grant you the credit terms you requested.

Your credit references were most satisfactory. We are happy to extend credit to you on a net-30-days basis.

▶ Explain the terms of the credit–credit limit, payment plan, invoicing cycle, and so forth. Mention any concerns you have about the reference check.

You will receive your statement shortly after the 16th of each month.

You may charge up to \$800.

We will require updated financial information periodically.

Should any transaction exceed \$6,000, we will need to reinvestigate your financial position at that time.

Because of our policy not to invoice customers more than once for any transaction, we will require you supply additional information and submit to a further credit check if any payment arrives in our office later than 30 days after our billing date.

In our reference check, we did discover one question we need you to clear up for us. Would you provide us with further explanation about...? This information may allow us to extend our credit limits on your account.

▶ State your confidence in a positive future business relationship.

We look forward to having you with us.

We're looking forward to a mutually positive business partnership.

Thank you for doing business with us; we look forward to meeting your needs.

Thank you for your interest in our products; we look forward to servicing your account.

Our business partnership should be highly rewarding.

Thank you for providing us with this financial information. We look forward to doing business with you.

We are pleased to welcome you as a customer.

Thank you for your cooperation with our investigation, and we are eager to work with you in meeting your printing needs.

Perhaps you'd like to put us on a mailing list for any future financial statements you prepare. That way, we won't have to trouble you for updates through the months and years ahead.

We pledge to you our best service in the years to come.

Offering Credit (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Carter:

Thank you for the opportunity to provide a financing alternative for the copier you are evaluating. Blaycox International has been approved for both our "Lease with Option to Purchase" and "Deferred Payment" plans. The approval is subject to a down payment of 15 percent of the amount financed. The rates and terms for both plans are summarized on the attached page.

The monthly payments are based on financing the total amount of the quote you received from us. These payments also include personal property tax but do not include insurance or sales tax.

Thank you for considering our copiers; we think you'll be very pleased with their performance and dependability.

Sincerely,

Offering Credit (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Hume:

On the basis of financial information dated August 1, 20–, from your company, we are pleased to extend to you a line of credit of \$250,000. In conformance with the industry, credit limits under normal circumstances are extended for a period of one year from the date of the financial information provided.

In order for us to continue to extend a line of credit, we will require you forward to us your most recent fiscal year-end balance sheet and the related statements of income and expenses on an annual basis. Please make a note of this necessary update.

Thank you for depending on us for your financial needs and for your usual fine cooperation with our procedures.

Respectfully,

Offering Credit (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Canfield:

Welcome to Buford's as a preferred charge customer! Your credit application has been approved, and you can begin enjoying the convenience of your preferred charge status today.

To make sure you don't miss out on a moment of shopping, we've already assigned you account number 458121T so you can charge up to \$1000 immediately. Please use your account number every time you place an order or inquire about your account, because it helps us serve you more quickly and efficiently. You'll also soon be receiving a Buford's credit card to use when shopping by mail or in our stores.

Enjoy your new Buford preferred charge and thank you for shopping with us.

Sincerely,

Offering Credit (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Hartford:

We have contacted the references you gave us, and they all gave you the highest recommendations about your prompt payments in dealing with them.

We are pleased, therefore, to grant credit terms to you and set up your account for monthly billing.

Thank you for giving us your business. We appreciate the opportunity to serve you.

Cordially,

Refusing Credit: Guidelines and Alternate Phrases

- ▶ **Thank the applicant for his or her interest in doing business with your company.**

Thank you for forwarding your credit application to us.

We appreciate your cooperation in completing our credit application.

Thank you for allowing us to review your credit application and history.

We appreciate your interest in doing business with our company.

Thank you for dropping by to discuss credit possibilities with our organization.

We are pleased to learn you are interested in our products and service.

- ▶ **State your refusal of credit in a tactful way, giving your reasons if appropriate.**

We have received information we cannot ignore in making our credit decision. This information leads us to believe because your monthly expenses are very near your monthly income, the financial burden for you would be excessive.

We think it is in the interest of both Sevelle and you that we decline to extend credit at this time.

With the current economic situation, we have had to set and abide by strict guidelines for credit. We are sorry your situation did not fall within the acceptable limits.

Because we cannot find record of any previous credit references, we are unable to open an account at this time.

Our research shows some information that has caused us to decide against granting credit in this instance.

Considering the information gathered in our recent investigation, we do not feel we can grant credit at this time.

We hope you understand, with the information our credit check has verified, we cannot extend credit in this situation.

We feel it is in both of our best interests to defer credit privileges at this time.

▶ **State under what conditions, if any, you will reevaluate your decision.**

Let's review the situation again perhaps next year to see if we can work out something then.

If you can provide us with additional information you feel we may have overlooked, please contact us again.

We realize, of course, your financial situation may be only temporary, so please contact us again when you think the facts have changed.

Perhaps if you can make a larger down payment, say \$1,000 more, we could reconsider your request.

If you think we have not gathered all the appropriate facts, please let us know, and we will review the situation once again.

We will reevaluate this decision if your financial picture changes in the future.

If you think your credit information as provided to us is incomplete or inaccurate, please let us know.

We suggest you write us again if you think you have further information that would make a difference in our credit evaluation.

If you have a considerable increase in monthly income, say \$500, please let us have that information and we will re-evaluate the decision at that time.

▶ **Suggest doing business on a cash basis.**

If you can make prepayment, we'd be eager to ship the merchandise immediately.

We appreciate your interest in our products, and we hope we can do some business with you on a cash basis until the credit situation improves.

We're sorry to have to give you disappointing news but know you understand our position. If we can serve you another way, let us know. We are proud of our products and hope you'll find they meet your specific needs.

May we ship your order C.O.D.?

We hope to hear you've been able to make other arrangements to enable you to make the purchase from us. We think you'll find the equipment to be the best on the market. Let us know what you decide.

We hope you choose to deal with us on a cash basis.

Thank you for expressing interest in our products; may we send them to you on a cash basis?

We hope you can purchase the equipment with cash. We think you'll be very pleased with the machine's performance.

Refusing Credit (Example 1)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. Portelo:

Thank you for your interest in Arrow's products and services. After carefully considering your credit application and history, however, we find our stringent guidelines will not allow us to extend credit at this time because of your past difficulties.

If you have some further information we have not yet considered or if you feel the credit history supplied to us is in error, please feel free to write us again, and we will reopen the credit investigation.

Our products are reliable and effective; we do hope you can make other arrangements to buy and use them.

Sincerely,

Refusing Credit (Example 2)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. Jennrette:

We thank you for the credit application recently submitted and your interest in doing business with us. We regret, however, we are unable, within our guidelines, to approve a monthly billing account for your company based on the information you supplied.

We will be happy to reconsider our decision upon receipt of an updated financial statement for your company prepared by an outside CPA firm.

Please be assured we will keep all information strictly confidential, using it for our internal purposes only.

Thank you for your understanding.

Sincerely,

Refusing Credit (Example 3)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Ms. German:

We have recently reviewed the year-end financial statements for Ardco Engineering. Because of the unbalanced financial condition at year end, Ardco does not now meet our stringent guidelines for extending unsecured credit.

So your company can continue its purchases on an unsecured basis, we need a bank letter of credit to serve as security for the account. In view of your firm's past history of monthly purchases, we recommend the letter of credit be set up for no less than \$125,000.

For your convenience, we have enclosed a copy of our format for the bank's letter so it includes the essential information we need. We look forward to serving you in the months ahead.

Sincerely,

Refusing Credit (Example 4)

Company Name or Letterhead
Address
City, State Zip

Date

Addressee
Address
City, State Zip

Dear Mr. George:

We are pleased to learn you are interested in our products and services. Under the strict terms of our present credit guidelines, however, we regret we cannot grant the credit you requested on this occasion. If we have somehow overlooked part of your monthly income, please feel free to call that to our attention, and we will update your credit application form here in our office.

If you perhaps can make a larger down payment on the sound system, say \$300 or more, we could reconsider your request. Let us know if you decide to do so, and we will be eager to review the purchase arrangements again.

Thank you for your understanding. We hope you will give us another opportunity to do business with you on a cash basis.

Sincerely,

Dianna Booher

Author of 44 Books

Communication Consultant

CEO of Booher Consultants

Keynoter on Workplace Communication

Dianna Booher, MA, CSP, CPAE, works with organizations to increase their productivity and effectiveness through better oral, written, interpersonal, and organizational communication.

Founder and CEO of her firm, Booher Consultants, Inc., she is also a prolific author of 44 books (22 on communication), and has published with Simon & Schuster/Pocket Books, Warner, Random House, and McGraw-Hill. Her latest books include:

- *The Voice of Authority: 10 Communication Strategies Every Leader Needs to Know*
- *Booher’s Rules of Business Grammar: 101 Fast and Easy Ways to Correct the Most Common Errors*
- *Speak with Confidence: Powerful Presentations That Inform, Inspire, and Persuade*
- *E-Writing: 21st-Century Tools for Effective Communication*
- *Communicate with Confidence: How to Say it Right the First Time and Every Time*
- *From Contact to Contract: 496 Proven Sales Tips to Generate More Leads, Close More Deals, Exceed Your Goals, and Make More Money*
- *Your Signature Work: Creating Excellence and Influencing Others at Work*

Good Morning America, CNN, *USA Today*, the *Wall Street Journal*, the *New York Times*, the *Washington Post*, *New York Newsday*, the *Los Angeles Times*, *Forbes*, *Success*, *Entrepreneur*, NPR, CNBC, Fox Family Network, and Bloomberg have interviewed Dianna for her opinions on critical workplace communication. *Successful Meetings* magazine has named her to its list of “21 Top Speakers for the 21st Century,” and she has been inducted into the Speaker Hall of Fame®.

Other Courses and Products Available from Dianna Booher

Writing and Grammar

Books

- Booher's Rules of Business Grammar** 294-pg. softcover
(McGraw-Hill)
- E-Writing: 21st-Century Tools for Effective Communication** 387-pg. softcover (Simon & Schuster / Pocket Books)
- Writing for Technical Professionals** 262-pg. hardcover
(John Wiley and Sons)
- Good Grief, Good Grammar** 238-pg. softcover (Random House)
- Great Personal Letters for Busy People** 591-pg softcover
(McGraw-Hill)
- To the Letter** 524-pg. (Jossey-Bass)
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- The Complete Letterwriter's Almanac** 350-pg. hardcover
(Prentice Hall)
- Winning Sales Letters** 333-pg.
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- Send Me a Memo** 201-pg. hardcover
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- Effective Writing** 4 hr.
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Books

- Communicate with Confidence!**
413-pg. (McGraw-Hill)
hardcover / softcover
- The Voice of Authority: 10 Communication Strategies Every Leader Needs to Know**
154-pg hardcover (McGraw-Hill)
- From Contact to Contract**
291-pg. softcover (Kaplan)
- Get Ahead! Stay Ahead!**
230-pg. softcover (McGraw-Hill)
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Quotations on Communication
Resignation Letters
Selling to Senior Executives
Tackling Tough Questions
Write to the Point
Writing “Bad News” Messages