

The Business Letter Library™

- Hundreds of letters, ready to use on disk
- Professionally written
- For business, administrative, and personal use
- Ready to customize, print, and mail
- For use with most word processing software packages
- Compatible with leading personal computers
- Easy to use

The Letter Library Series

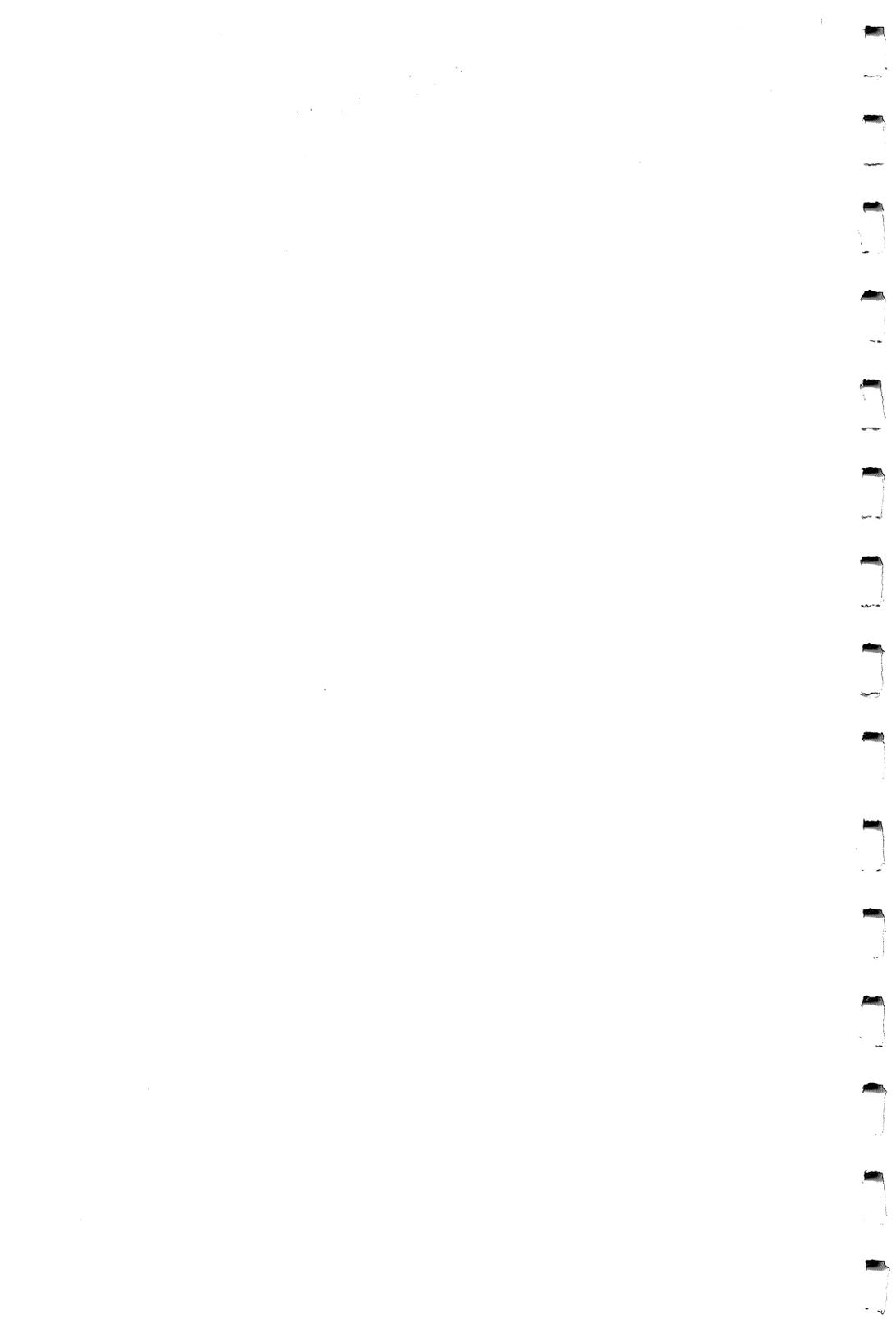
The Business
Letter Library™

Reference
Guide

The Letter Library Series™

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Letter Library™**

**Reference
Guide**



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Letters of The Business Letter Library™
by *William C. Himstreet, Ph.D.*

LetterSearch™ Program
by *Daryll Shatz*

LetterSearch™ Program Documentation
by *Liz Nachman*

Outside Sleeve and Cover Design
by *Software Express*

Manual Layout and Design
by *Lonnie L. Iannotti*

Delta Point®

711 West St., Unit B10, Costa Mesa, CA 92627

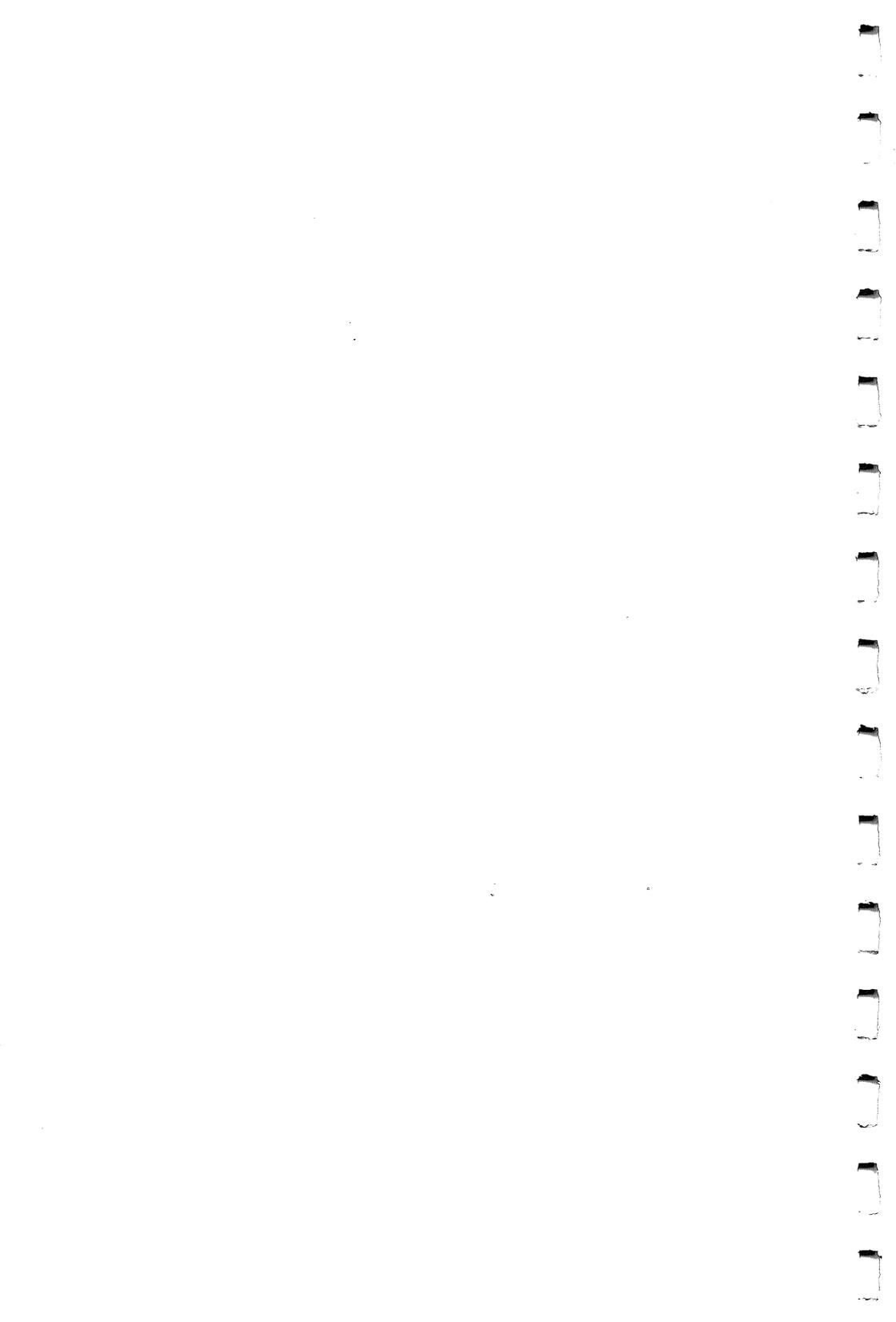
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WELCOME TO THE BUSINESS LETTER LIBRARY™

Have you ever found yourself . . .

- Not knowing how to begin an important business letter?
- Stymied about what main points to cover?
- Confused about the style and tone of your professional correspondence?
- Looking for a particular letter to see what you said?
- Missing documents you want to refer to regularly?

The Business Letter Library™ can help on every point. With over 200 letters stored on disk, there's one appropriate for almost any situation. Using your word processor, you can customize any of these letters to suit your needs.

But what's most important to the package is the *LetterSearch™* feature. This allows you to quickly and easily select the ideal letter from 42 categories. Your personalized letters can be saved under these categories as well, so you always have them available.

If you choose to rewrite the letters entirely, you will find the the program's *KeyStyle* feature a helpful guide. At the beginning of each letter the key points are listed. All you have to do is put the points in your own words and style.

You'll discover you can probably use the program with little assistance. But please take a moment to read through this documentation, and pay close attention to the advice about making backup diskettes.

BEFORE YOU START

You will need the following hardware and software to run **The Business Letter Library** package.

HARDWARE REQUIREMENTS

- An Apple II, II Plus, or IIe with 48k of main memory (RAM).
- At least one disk drive.
- A monitor.
- A printer (if you wish to print from your word processing program).

SOFTWARE REQUIREMENTS

- The **Business Letter Library** master disks provided with this package.
- One **DOS** formatted disk (for storing your personalized and edited letters).
- Any word processing program which uses and can read **ASCII** text files (compatible with the computers mentioned above).

INTRODUCTION

The Business Letter Library consists of two basic parts. The first is The Business Letter file containing the letters. The second part is the *LetterSearch* program that allows you to locate and view the letters. This feature works independently—not simultaneously—with your word processing package (provided it uses **ASCII** text files).

Note: The *LetterSearch* program is NOT a word processor or a line editor.

The *LetterSearch* program itself is located on the disk labeled #1. Disk #1 also holds some letter files as do disks 2, 3, and 4. But, you might be saying—I only have two disks.

No, you're not missing anything. **The Business Letter Library** uses "flippie" disks. These disks are two-sided disks with separate catalogues for each. This means that you have four single-sided disks stored on two double-sided disks. Simply stated, you should treat each side of the two master disks as one disk. We'll refer to these disks as "masters".

We strongly urge you to make backup copies of EACH SIDE of the two disks included in the package. Once you've made copies, store the masters in a safe place—away from excessive heat or cold and any magnetic fields.

GETTING STARTED

Before you begin to use the program, PLEASE make copies of your masters! You will need:

- Four blank disks.
- The **DOS System Master** disk provided with your computer.

Place the **DOS System Master** disk in drive A. If your computer is not turned on, turn it on. If your computer is on, re-boot it according to your usual procedure. You will now see the customary

] prompt.

Now Type

RUN COPYA [CR]

When the Apple Disk Duplication Program appears, enter the appropriate drive numbers for your system and type a **[CR]**. Then follow the instructions on the screen to duplicate the *Letter Library* master disks. Repeat this procedure for the remaining disks using EACH SIDE of the *Letter Library* disks as if they were separate disks. This means that you must turn EACH disk over and place it in the drive to copy each side separately. Now you will have one complete working copy of the two master disks on four separate disks.

Label these disks appropriately, and put the master disks in a safe place.

Now, if anything happens to the working copies, you will be able to make new copies from the masters.

NOTE: If you plan to save your edited or customized letters on a new disk, you might want to place write-protect tabs over the notches on each copied disk. This will prevent you from

accidentally writing over the original letters and will keep the working disk the same as the masters.

You will find it more convenient to save all of your new and edited letters on a separate disk.

FOR HARD DISK USERS: All the *Letter Library* disks may be copied onto a hard disk. If you decide to store ALL sides of the two disks onto your hard disk, you will be able to ignore the program's instructions to insert different disks in order to view the letter.

BOOTING THE PROGRAM

Place disk #1 in drive 1, re-boot the computer (or turn it on), and the program will start automatically.

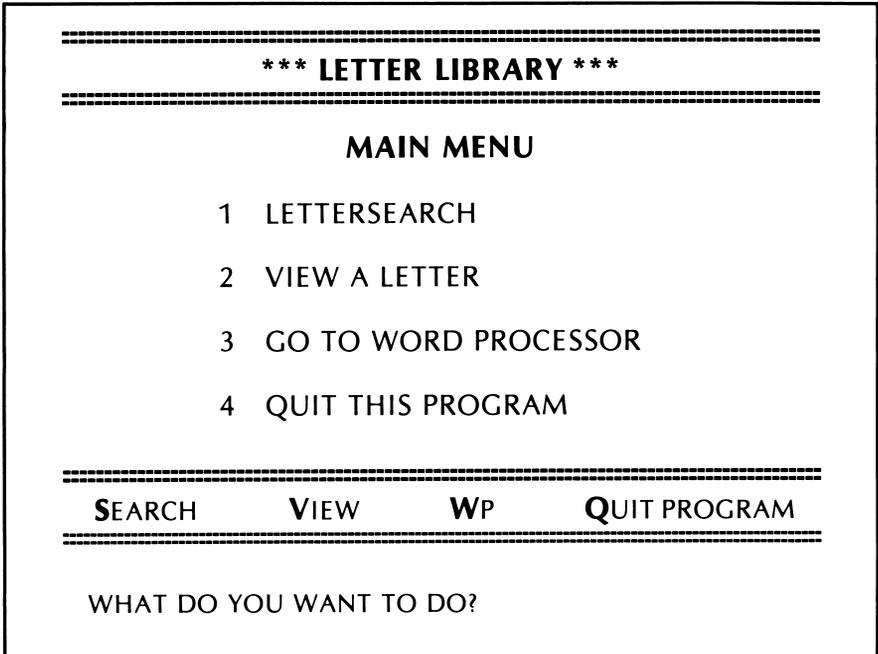
You can also boot from **DOS**. When you see the] prompt, place disk #1 in drive 1, and type

BRUN LL [CR]

and the program will boot.

USING THE LETTERSEARCH™ PROGRAM

When you have finished booting or loading the program, you will see a copyright screen for several seconds. Next, you will see the MAIN MENU screen with four options.



The second line from the bottom lists commands that correspond to the topics listed on the MAIN MENU. The first letter of each command on this line is displayed in "inverse" (black on white).

To select the option from the MAIN MENU, simply press the letter on the keyboard which corresponds to the "inverse" letter on the screen.

For example, typing **S** brings up *LetterSearch*, **V** allows you to view a letter, **W** lets you go to your word processing program, etc.

NOTE: You can also press the number corresponding to your choice from the MAIN MENU, followed by a [CR], to select an option.

The best way to see the different types of letters available is to use the *LetterSearch* disk #1 or use the Category Index in your Reference Guide beginning on Page 14.

The bottom line of the screen is asking you what to do. Since you want to search the letters available, press

S

After a moment, you will see the *LetterSearch* categories. But that's not all. Notice the second to last line (remember the one that lists the inversed commands). It has changed from the one you saw at the MAIN MENU level.

***** LETTER LIBRARY *****

LETTERSEARCH

- 1 ACCEPTANCE
- 2 ACKNOWLEDGEMENT
- 3 ANNOUNCEMENT
- 4 APOLOGY
- 5 APPOINTMENT
- 6 APPROVAL
- 7 CANCELLATION
- 8 CLAIMS
- 9 COLLECTION
- 10 COMPLAINTS
- 11 CONFIRMATION
- 12 CONGRATULATIONS
- 13 CREDIT

— MORE —

SEARCH AGAIN FORWARD BACKWARD QUIT

WHICH NUMBER DO YOU WANT?

The two most important keys to you now are **F** and **B**. These keys allow you to scroll through the available categories. Press

F

and watch what happens. You will see a listing of the categories from 14 to 26. Try pressing the **F** key one more time. Do you see the new categories? Try it again. Now one more time. That's right, the screen doesn't change because there are no more categories. You can go backwards too. Try pressing the **B** key . . . and back you go.

The last line on the screen has changed also. It is now asking you which category number you want. Type

14 [CR]

to select the Employment option. Now, you can see 12 different types of employment letters. Take a look at type 5 by pressing

5 [CR]

Six subjects are under the Congratulations type of employment letter. Try selecting subject number 1 (**SUGGESTION, FOR**) by pressing

1 [CR]

Now the program is telling you that this letter is under the file name of **EMP12** on disk #2 and it has the name **CONGRATULATING AN EMPLOYEE ON A SUGGESTION**. Let's take a look at this letter.

***** LETTER LIBRARY *****

USE THIS FILE NAME:
EMP 12

LOCATED ON THIS DISK:
#2

TITLE OF THIS LETTER:
CONGRATULATING AN EMPLOYEE ON A SUGGESTION

SEARCH VIEW WP QUIT PROGRAM

WHAT DO YOU WANT TO DO?

Notice the bottom prompt line again is asking for instructions. Since you want to view the letter, hit the corresponding key

V

The screen will change and you'll see more instructions. Now insert the appropriate disk (in this case, disk #2). Once you have inserted disk #2 into the drive, press **[CR]** to continue. (NOTE: If at this point you decide NOT to view this letter, press **Q** and you will return to the MAIN MENU).

CONGRATULATING AN EMPLOYEE ON A SUGGESTION (EMP12)

Key Items: Congratulate, mention suggestion, close warmly

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

Congratulations on your receiving a (\$250 award) for your suggestion (providing employees with an incentive for soliciting new savings accounts.)

The (Executive Committee) has adopted the suggestion (almost) exactly as you proposed it. (Approval by the appropriate Board committee is practically assured.)

(We plan to announce the program and to put it into effect on January 1. I am impressed by your creativity and by your skill in putting the procedure together.)

I hope you will continue to provide suggestions, which are rewarding for you and for the (credit union).

Cordially,

NOTE: The *Letter Library* letters have been written using standard margins. If your computer cannot display standard letter margins, the letters will be displayed with a "wrap-around" effect, where part of a line is extended onto the next line.

Once you press [CR], you will see the letter appear on the screen. At the top, you will see the title of the letter
CONGRATULATING AN EMPLOYEE ON A SUGGESTION.

Below this is a line reading *Key Items*, which lists the major points included in such a letter. The *Key Items* allow you to immediately focus on the highlights of your letter.

Below is the body of the letter. All of the variable information—that is, the contents of the letter that will change—is enclosed in parentheses. Obviously, in the case of a letter where the writer is congratulating an employee, the information will vary greatly depending on the situation.

Would you like to see the rest of this letter? Simply press

[CR]

in response to the MORE prompt, the letter will scroll through to the end.

If you decide to use this letter, you can go directly to your word processing program to edit it.

You may write a letter using your own words and style. Use the *Key Item* line and the letter as a guide. The *Key Items* line provides you with major points to be included in your letter. Looking at the letter and the *Key Item* line gives you a starting point and structure for your own letter. The problems of "what to say" and "how to say it" are virtually eliminated, thereby saving you much time.

Use your word processing software to delete any lines not used in this letter. Don't forget to delete the *Letter Title* and the *Key Item* line!

Let's look at some other letters.

Before you go back to the MAIN MENU, you must re-insert disk #1 into the drive. Do that now.

Hit the [CR] one more time, and you'll return to the MAIN MENU.

If you changed your mind, and decided to work on the **CONGRATULATING AN EMPLOYEE ON A SUGGESTION** letter after all, you can press the V key. Try it.

This screen will look familiar. It shows the name and file name of the letter you just saw. You can go back and look at this one, or go directly to your word processor.

If you don't want to do either of these, you can look at another letter instead. Type

S

to display the letter categories. This time, try category number 9, **COLLECTION**. Press

9 [CR]

Again you are provided with a list of collection letters from which you can choose. Select type 5 (**PAYMENT, OF**) by pressing

5 [CR]

Again, you see the subject numbers. Let's look at the one called **FINAL**. By now, you should have the hang of it—pressing

3 [CR]

will get you the name of the letter, disk number, and the file name. Press

V

to bring up the file name for this letter. Make sure the correct disk (#4) is in the drive, then press

[CR]

to view this letter. Notice again the *Key Item* suggestions on the second line. The purpose of this letter? Simply to send your check and thank your creditor. Notice again, that the variable parts of the letter are in parentheses. Suppose you want to use your word processing program to edit this letter.

Let's do that now.

GOING TO YOUR WORD PROCESSOR

You should still have the letter called **TRANSMITTING FINAL PAYMENT ON AN ACCOUNT** on your screen. If not, use the view command (**V**) to view file **TRN6**.

Once this file is on the screen, make sure that disk #1 is in drive 1, and press

[CR]

to get back to the **MAIN MENU**. You should see the familiar prompt "What do you want to do?" at the bottom of the screen. Press the **W** key to go to your word processor.

You will see the message telling you the file name of the letter you have selected. Make sure you write down the name of the letter. **THIS IS IMPORTANT!**

Though you can list the file names using **DOS** or your word processor, you'll have a tough time determining which file corresponds to which letter.

Make a note of **TRN6, #4**. Now, insert your word processing program into drive 1, and re-boot or reset your computer, using the procedure you would normally use to boot a new program. (Note: If you change your mind at this point, a **[CR]** will take you back to the MAIN MENU).

Now you are ready to edit the letter. Load this document or file using the standard procedure for your word processor. If you place the *Letter Library* disk (#4) in your drive 2, you may have to specify it by typing the drive number as well as the file number (**TRN6**).

NOTE: Some word processing programs require specific file names or extensions. Check your program documentation to see if this is required. If it is, use the **DOS RENAME** command to change the file names. Then follow your standard word processing procedures.

And now you are ready to do any editing necessary. In fact, once you read the letter, you may want to erase the whole thing, and start from scratch using the *Key Item* line as a guide.

Many people find that using their word processor's "find and replace" command is an efficient way to locate the parentheses within the letter.

When you are ready to print the letter, don't forget to erase the title of the letter and the *Key Item* line at the top.

WHAT TO DO WITH YOUR FILES

If you followed the directions at the beginning of this manual, you will be using working disks copied from the master. Now, you can decide how to handle the letters you create. You may want to:

- Use another disk to store all the “edited” letters (leaving the working copy of the files unaltered)

OR

- Store the new letters over the old (so you replace the originals with your own customized letters)

Remember, if you choose to write over the files you copied when you first started working with the program, your originals exist only on the master disks.

EXITING THE PROGRAM

To exit the program, type

Q

(or 4 followed by **[CR]**) at the MAIN MENU level, and you will see the familiar **DOS** prompt at the bottom of the screen. You can also exit the program by typing **Q** whenever QUIT PROGRAM appears on the command line. You may type the location or name of the program you want to boot, or if you want to return to the *Letter Library* program, simply type

BRUN LL [CR]

and the MAIN MENU will reappear.

NOTE: While you are using the *Letter Library* program, if you see the **DOS** prompt at the bottom of the screen, AND you want to return to the program, just type **BRUN LL** followed by **[CR]**. You will return to the MAIN MENU provided you have disk #1 in drive 1.

THE LETTERSEARCH QUICK REFERENCE

Here is a summary of all the commands you'll be using.

At MAIN MENU Level:

- S** executes the *LetterSearch* program
- V** lets you view a letter (must have letter selected first)
- W** takes you to your word processor (must be in drive)
- Q** exits the program to the operating system

After pressing **S**:

- S** displays the *LetterSearch* screen (categories)
- F** moves one screen forward in the *LetterSearch* categories
- B** moves one screen back in the *LetterSearch* categories
- Q** returns you to the MAIN MENU

After selecting *LetterSearch* category:

- S** display the *LetterSearch* screen (categories)
- F** moves one screen forward in the *LetterSearch* types
- B** moves one screen back in the *LetterSearch* types
- Q** returns you to the MAIN MENU

After selecting *LetterSearch* type:

- S** displays the *LetterSearch* screen (categories)
- F** moves one screen forward in the *LetterSearch* types
- B** moves one screen back in the *LetterSearch* types
- Q** returns you to the MAIN MENU

After selecting the *LetterSearch* subject:

- S** displays the *LetterSearch* screen (categories)
- V** lets you view the letter
- W** takes you to your word processor (must be in drive)
- Q** exits the program to the operating system

After pressing V at MAIN MENU or V at *LetterSearch* subject level:

Q returns you to the MAIN MENU

NOTE: If at any time you find yourself out of the program and in the operating system (you'll see the] prompt at the lower left of the screen), simply type

BRUN LL [CR]

and you'll return to the program.

INDEX CATEGORIES

LETTER NAME	FILE	DISK	PAGE
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Job Applications - acceptance of offer	JOB9	#4	81
Accepting an appointment (business)	POS2	#3	104
Accepting an appointment (Civic)	POS1	#3	103
Accepting a speaker engagement	SPK3	#3	145
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Acknowledging a suggestion with rejection	ACK3	#4	39
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Acknowledging payment with refund due	ACK1	#4	38
Acknowledging speaker's honorarium	SPK2	#3	144
Acknowledging back order items	ORD9	#3	102
Acknowledging incomplete order	ORD8	#3	101
Acknowledging order - change needed	ORD1	#3	98
Acknowledging order letters (routine)	ORD7	#3	101
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LETTER NAME	FILE	DISK	PAGE
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Approving credit with sales possibilities	CRD3	#1	59
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Cancelling reservations - no advance payment	RES1	#3	117
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CLAIMS			
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Claiming a routine adjustment	CLA2	#3	44
Approving a claim or adjustment	CLA4	#3	45
Declining adjustment/claim with alternative	CLA1	#3	43
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Collection - one-time discount violation	COL15	#2	55
Collection - repeat late taker of discount	COL14	#2	54
Collection - late payor change of due date	COL12	#2	53
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Collection - ultimatum to note co-maker	COL10	#2	52
Collection - personalized inquiry	COL7	#2	51
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Collection - reminder of payment due	COL2	#2	48
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Complaints - unsatisfactory service	CPL1	#3	55
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Complaints - incorrect billing	CPL3	#3	56
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Job applications - confirming interview appt.	JOB13	#4	83

LETTER NAME	FILE	DISK	PAGE
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Confirmation of speaker arrangements	SPK4	#3	145
Confirming an appointment	APP2	#1	41
Confirming an appointment	APP5	#1	42
Confirmation of telephone order	ORD3	#3	99
Confirming oral instructions	CNF2	#3	46
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Confirming a telephone call	CNF3	#3	47
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Congratulating a reluctant retiree	EMP2	#2	63
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Congratulating an employee on a suggestion	EMP12	#2	68
Asking for employee cooperation	EMP16	#2	70
Congratulating a reluctant retiree	EMP2	#2	63
Congratulating a happy employee on retirement	EMP13	#2	69
Granting a job interview	EMP7	#2	66
Congratulating employee on years of service	EMP17	#2	71
Notifying employees of colleague retirement	EMP14	#2	69
Suggesting improved employee performance	EMP9	#2	67
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LETTER NAME	FILE	DISK	PAGE
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Thanking employee with a floating vacation day	EMP15	#2	70

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Invitation to luncheon	INV4	#3	72
Accepting a formal invitation	INV1	#3	71
Declining a formal invitation	INV2	#3	71
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Job applications - refusing to provide reference	JOB14	#4	83
Job applications - rejection due to test scores	JOB19	#4	86

LETTER NAME	FILE	DISK	PAGE
Job applications - thanks after rejection	JOB5	#4	79
Job applications - rejection: unqualified	JOB17	#4	85
Job applications - confirming interview appt.	JOB13	#4	83
Job applications - follow-up reminder	JOB10	#4	81
Job applications - request for position change	JOB2	#4	76
Job applications - resume outline and instruction	JOB1	#4	75
Job applications - request for job application	JOB11	#4	82
Job applications - requesting more information	JOB16	#4	84
Job applications - info needed from applicant	JOB15	#4	84
Job applications - letter from new graduate	JOB6	#4	79
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THE AUTHOR:

William C. Himstreet, Ph.D., author of **The Business Letter Library™** letters has taught over 250,000 business managers the art of effective business letter-writing through his best-selling college text, *Business Communications* (Kent Publishing Company, Boston, 1983), and eleven other business communications books.

A nationally-recognized expert in the field of business communications, Mr. Himstreet was a Professor of Business Communications and Associate Dean of the Graduate School of Business at the University of Southern California.

Mr. Himstreet is a noted speaker on the subject of business communications and has also served as a business communications advisor to numerous major corporations.

LETTER WRITING TIPS

by *William C. Himstreet, Ph.D.*

PLANNING LETTERS

Letters are planned in terms of the expected reaction of the recipient. Three plans have been long accepted.

1. When the message will please the reader: or will be routine:
 - a. Open with the pleasing information
 - b. Then fill in necessary details
 - c. Close with a subtle reminder of the pleasing information:
"I look forward to . . ."

2. When the message will be disappointing:
 - a. Open with a neutral statement. *"Thank you for . . ."*
 - b. Explain the reasons before you
 - c. Give the disappointing information, then
 - d. End with a pleasant or forward-looking idea. Don't say you are sorry.

3. When the message must persuade the plan calls for (a) attention, (b) interest, (c) conviction, and (d) request for action.

As you review letters in this program, notice how the plans have been applied.

PREPARING INSIDE ADDRESSES

1. For mailed correspondence, three-line addresses should be a minimum.
2. Use the exact company name, personal name, and job title as your reader does.
3. For better balance, the job or position title of the addressee (if used) should be on the line following the name.
4. Although the zip code must be on the envelope, its inclusion as part of the inside address is optional. If included, the zip code is available for later reference.

USING ATTENTION AND SUBJECT LINES

1. The attention line is part of the address and should precede a salutation:

ABC Company
17 Hill Street
Phoenix, AZ 85284

Attention: Purchasing Agent

2. The subject line is logically a part of the message and should follow the salutation:

ABC Company
17 Hill Street
Phoenix, AZ 85284

Attention: Purchasing Agent

Subject: Your Purchase Order 14-8879

3. Because "*Gentlemen*" is a sexist term to many people, it should be avoided. Try "*Friends*" or, rarely, "*Ladies and Gentlemen*." When written to a company, a salutation is hardly necessary. Omit it and use a subject line.

ELIMINATING SEX STEREOTYPED LANGUAGE

Until recent times, the masculine gender pronoun was used when the gender of a noun was not revealed, as in:

"Each employee should take HIS materials . . ."

Today women can hold the same jobs as men, and the use of the masculine pronoun is risky. Offensive use of pronouns can be avoided in these ways:

1. Avoid the pronoun completely.

"On arrival, the secretary should . . ."
not *"When the secretary arrives, she should . . ."*

2. Repeat the noun

" . . . as the accountant indicated. The accountant . . ." not
" . . . as the accountant indicated. He said . . ."

3. Use plural nouns

"All employees should take their materials . . ."

4. Use pronouns of both genders

"Each employee should take his or her materials . . ."

SUGGESTIONS FOR ELIMINATING DEADWOOD

Ancient language often plagues letter writers. Here are some worn out expressions and their modern equivalents.

at an early date	soon
at this time	now
at this point in time	now
attached please find	attached is
enclosed herewith	enclosed
a check in the amount of	a check for
Thanking you in advance	Thank you
under separate cover	in another mail
attached hereto	attached
Awaiting your reply, I remain	I look forward to . . .
please contact me	please let me know
per your request	as you requested
pursuant to your request	as you asked
recent date	(be exact)
the writer	I
I would like to say	(go ahead and say it)
the undersigned	me

SUGGESTIONS FOR COLLECTION LETTERS

Although most collecting is done by form messages and telephone, collecting through letters is often the most effective means. Collection messages fall in four primary stages:

Reminder Stage—when the account is first past due; assumption is, payment was merely overlooked.

Inquiry Stage—follows failure to pay after reminder; assumption is that something is preventing payment.

Appeal—follows inquiry non-payment; assumption is that persuasion is necessary.

Ultimatum—follows appeal; this is the last chance for debtor to avoid legal action.

The reminder is perfunctory; the inquiry offers help; the appeal seeks to persuade; and the ultimatum is a “*now-or-never*” message.

SUGGESTIONS FOR REFUSAL LETTERS

How to say “no”

1. A blunt no in the first sentence is poor.
2. Say what you do to imply the refusal.
 - a. We ship only in lots of 12 or more. (Implies orders are not shipped in smaller amounts.)
 - b. The discount privilege is for employees only.
 - c. The discount is exclusively for members.
3. Use the subjunctive mood.
 - a. I’ll be away on the 20th. If I could accept, I certainly would.
 - b. I wish it were possible for me to grant your request.
4. Follow the subjunctive with an alternative.
 - a. I wish I could send you the materials. As an alternative, you might like to visit our travel library.
 - b. If I could accept, I certainly would do so. However, I would look forward to another invitation in a few months.
5. In any case, give the reason or reasons for the refusal before you refuse.
 - a. Because I’ll be out of town, I’ll be unable to accept.
 - b. Because the problem did not occur within the warranty period, the request must be declined.

SALUTATIONS AND CLOSINGS

Salutations and closings (complimentary closes) are often confusing items to writers. General practice includes the following guidelines:

1. If you know the person well, use his or her first name.

Dear Andy *Dear Bill* *Dear Louise*

2. Let the formality of your letter guide you.

Informal: *Dear May*

When reader is not personally known: *Dear Mr. Doe, Dear Ms. Doe, Dear Mrs. Doe*

Highly Formal: *Dear Sir, Dear Madam (becoming trite), My dear Congressman Doe*

3. For closings, match the salutation

Dear May - Love; As Always; Very sincerely; Cordially, Dear Mr. Doe - Sincerely, Cordially, (add "yours" as an option.) Dear Sir - Sincerely yours, Yours truly

4. Cordially smacks of warm friendship; sincerely is less warm.
5. In most business correspondence, the combinations of *Dear Mr.-Sincerely; Dear Bob-Cordially; and Dear Sir-Yours truly* are recommended.
6. Best regards, best wishes, adios, and other unusual endings are appropriate in very friendly messages.
7. Avoid "Gentlemen." It is a sexist term. Use "Ladies and Gentlemen," "Friends," or omit the salutation.

THE LETTERS

ACKNOWLEDGING PAYMENT WITH REFUND DUE (ACK1)

Key Items: Thanks, review circumstances, forward look

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

I was pleased to receive prompt payment to cover your (February bill).

Your payment was for (\$1440), but the bill was only (\$1404). Therefore, I am enclosing our check for (\$36) to cover the overpayment rather than issuing a credit to your account.

Thanks once more, (Mr. Smith), for being such a good friend and customer.

Cordially,

ACKNOWLEDGING PAYMENT RECEIVED (ACK2)

Key Items: Thanks, then details, forward looking close

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Thank you for sending your payment of (\$1645.55) for our invoice (No. J-4456 for the servicing of the air-conditioning and heating system in your Hill Street facility).

(The servicing went well; and as you can see by the bill, replacement parts needed were minimal. The system should be in good shape for another year.)

We appreciate the opportunity to serve you and look forward to doing so again.

Sincerely,

ACKNOWLEDGING A SUGGESTION WITH REJECTION (ACK3)

Key Items: Acknowledge, give reasons, reject, thank employee

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

I was pleased to see your suggestion about (rerouting the flow of traffic in the food section of the cafeteria, and I had our physical facilities director look into it).

(Apparently, the suggested change would bring food workers into very close proximity to the lavatory area. In this case, the change would be in violation of city health codes. Nevertheless, I recognize the need for some alternative and have asked the staff to examine the problem thoroughly.)

Creative ideas like yours have enabled us to make many improvements, (Jan). Many, many thanks.

Cordially,

APOLOGIZING FOR A DELAY IN SHIPPING (APL1)

Key Items: Apologize, explain, close gracefully

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

I'm a little embarrassed to tell you that we have had an unavoidable delay in completing (the final preparation of the appraisal report on the property in Indo County).

(The appraiser who was doing the report underwent an emergency appendectomy on the 10th. The report is now being assembled--in excess of a hundred pages--and will be hand delivered to your office on the 18th, three days after our promised date.)

I'm sorry for the delay, but I'm sure you can understand the situation.

Cordially,

APOLOGIZING FOR ERROR IN BILLING (APL2)

Key Items: Apologize, explain, close gracefully

(date)

(name)

(company)

(city, state, ZIP)

Dear ():

You are absolutely correct! We did err in sending you a (duplicate billing for \$312.25--an amount you did pay).

Things like this are often difficult to explain. I can only guess that somehow your payment was (posted to another account). (Our computers are only as good as are our instructions to them.)

Please accept my apology for the error. We do appreciate your calling it to our attention.

Sincerely,

CHANGING APPOINTMENTS (AP1)

Key Items: Explain, apologize, ask for a response

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Because of an (unexpected visit by several of our Japanese distributors), I'll be unable to keep our appointment on (July 8).

(However, I'm planning to come to Denver the following week; and I would like to meet with you at any time on July 13, 14, or 15.) I'm sorry for the sudden change of plans.

Will you let me know the time and day most convenient for you. Either drop me a note or phone collect.

Sincerely,

CONFIRMING AN APPOINTMENT (APP2)

Key Items: Confirm date, time, place, purpose.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

I look forward to seeing you (in Denver on June 12). I will be at (your office at 10:30 a.m.) and will bring (job descriptions of the three positions we hope to fill by September 1).

I will arrive the (afternoon of June 11) and will be staying at the (Brown Palace Hotel) should you need to reach me.

Cordially,

ASKING FOR A BUSINESS APPOINTMENT (APP3)

Key Items: Specific details, confirmation

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

On (September 30) I will be in (New York), and I'd like very much to meet with you to discuss (our preliminary plans for the national meeting scheduled for San Francisco next February).

Although I would prefer a mid-morning time, I can meet with you anytime (that day).

Will you let me know soon the time convenient for you.

Sincerely,

MAKING A BUSINESS APPOINTMENT FOR ANOTHER (APP4)

Key Items: Introduce the person, details, thanks

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(Jerome West, our new Affirmative Action officer), will be in (Washington) on (August 12 and 13) and would like to meet with you (for about a half hour) to discuss (the new reporting requirements).

(He) can meet with you at your convenience. Please let me know the time you select. Thanks very much.

Sincerely,

CONFIRMING AN APPOINTMENT (APP5)

Key Items: Confirm time and place, close graciously.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

I will be pleased to meet with you at (10 a.m. on Wednesday, August 13), as requested. My office is in (Room 1600).

Your (proposal) sounds interesting, and I look forward to seeing you.

Sincerely,

APPOINTMENT SCHEDULE FORM (WEEKLY) (APP6)

Key Items: Time, person, subject

Appointment Schedule
Week of ()

Date	Time(s)	With	Nature of appointment
Monday	(9 a.m.) (11 a.m.)	(Walsh) (Conroy)	(Sales presentation) (Employee evaluation)

Tuesday

Wednesday

Thursday

Friday

DECLINING AN ADJUSTMENT OR CLAIM WITH ALTERNATIVE (CLA1)

Key Items: Neutral opening, explanation, refusal, alternative.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Thank you for returning your (wristwatch and giving us an opportunity to examine it).

After examining the (watch), our inspection supervisor reported that (it had perhaps inadvertently been immersed in water). (Because the guarantee excludes water damage, the watch is not covered.) However, we do have a proposal.

(We can repair the watch and return it to its original condition, which you enjoyed for ten months, for only \$13.50. This is our actual cost of repairs. If you'd like us to do this, simply return this letter with your written permission to go ahead. We will ship the repaired watch to you c.o.d.)

Sincerely,

CLAIMING A ROUTINE ADJUSTMENT (CLA2)

Key Items: State claim, add details, close confidently

(date)

(name)

(company)

(address)

(city, state, ZIP)

Subject: Request for Adjustment

Please send me a refund check (receipt copy attached) or a replacement for the (R-12 camera which I am returning by insured mail).

(The camera has no lens.)

I have no idea how this could escape quality control procedures, but I do look forward to an adjustment.

Sincerely yours,

CLAIMING AN ADJUSTMENT WHEN PERSUASION IS NEEDED (CLA3)

Key Items: State case, be persuasive, ask for action

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Your guarantee of satisfaction or your money back is the reason I (had four shock absorbers placed in my car just six weeks ago.)

(When I had my car serviced in your Camarillo store yesterday, June 15, the serviceman told me one of the shocks had no liquid in it and was inoperative. When I explained that they had been installed in that shop, he said the replacement would be free.)

(Imagine my surprise when I paid the bill and found that I had been charged \$6.60 for labor to install the shock in addition to the normal labor charge for servicing. Of course we had an argument; but because I had an important appointment, I paid the bill and left.)

Now I'm writing you to correct the situation. (I have no doubt that the serviceman felt the charge was warranted. But since your shop installed the defective shock, you should also install the replacement free of charge. Copies of the two bills in question are attached. Please send a check for \$6.60 to back up your guarantee.)

Sincerely,

APPROVING A CLAIM OR ADJUSTMENT (CLA4)

Key Items: Approve willingly, explain, end graciously

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

We are pleased to send you a new (Rose Marie swim suit in the same style, color, and size) you originally purchased.

(How the seams tore out or even escaped the eyes of our quality control people was a mystery for a while, but we did solve it. Apparently a very bad spool of blue thread escaped our notice, because yours was not the only suit of that style returned. As a result, we are attempting to recall all unsold suits in that batch.)

Thanks for giving us an opportunity to improve our products. We try very hard to avoid such problems, (Miss Smith); and we apologize and also express our appreciation to you.

Cordially,

DECLINING AN ADJUSTMENT OR CLAIM WITH NO ALTERNATIVE (CLA5)

Key Items: Neutral opening, explanation, refusal, close

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Thank you for returning your (35mm camera) for our inspection.

Our examination revealed (that the door to the film chamber had been bent beyond repair, and screwdriver marks had been made on the lens shutter apparatus rendering it useless). (The camera) cannot be repaired, and the warranty covers only problems caused during ordinary use.

Had the damage been a result of ordinary use, we would gladly make an appropriate adjustment. The (camera) is being returned to you (in another package).

Sincerely yours,

CONFIRMING ORAL INSTRUCTIONS (CNF1)

Key Items: Recall specifically, ask for confirmation

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear (): :

(Last week at the Board meeting you suggested that the Loan Committee report only delinquent loans in excess of \$1000 and then report all delinquent loans of lesser amounts as a single total.)

(I understand the first part, but would the total of delinquent loans of less than \$1000 be better understood if we break them down into so many loans in some categories. For example,)

(30 delinquencies of less than \$500 = \$7500

15 delinquencies of \$500-999 = \$8300

45

\$15800

(I will do it in this way if I do not hear from you by October 5. I believe your suggestion is one that will reduce the amount of detail with which we seem to swamp Board meetings.)

Sincerely yours,

CONFIRMING ORAL DISCUSSIONS (CNF2)

Key Items: Recall the setting; be specific

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear (): :

This letter will confirm our discussion of (April 10) about (assignment of responsibilities for the June meeting of members.)

(Jane Tass - Selection of menu

Marty Jones - Ticket sales and collections

Vicki Taylor - Obtain speaker or other program

Mary Swann - Plaques for outgoing officers)

(Additionally, you will conduct the presentation and induction of new officers.)

(I believe this list covers all the bases.) Please call me to confirm my understanding as I have outlined it here.

Cordially,

CONFIRMING A TELEPHONE CALL (CNF3)

Key Items: Mention confirmation; give details.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

(This morning) I talked with the (Production Manager, Tina Ells), about (two) items:

1. (We have a correction on page 25 of the proofs in which "twenty four" should be changed to "Fifteen". My arithmetic is to blame.)
2. (Wayne and I both need sets of page proofs to complete the index.)

(So far, the project looks very good. I'll appreciate your making the change on page 25 and also sending the extra sets of page proofs.)

Cordially,

CONFIRMING A TELEGRAM (CNF4)

Key Items: Repeat the exact telegram, add information

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Today I sent you the following telegram:

(Merger with Biscayne Federal approved this morning. We're in business.)

(I just want you to know how excited we are about this arrangement that adds much to our interstate operations. We will have a full presentation and discussion at our next meeting. Best wishes.)

Sincerely,

COLLECTIONS--CANCELLING CREDIT (COL1)

Key Items: Cancel, review facts, press for collection

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Much to my regret, I must tell you that effective immediately we have stopped extending credit to (your firm). The long past-due balance on your account is now (\$6,788.50), and (no) payments have been made during the past (three months).

Because of our formerly good relationship, we did not press you with our normal collection procedures. But you do understand, I'm sure, why we must discontinue credit and make every effort to help you clear your obligation. Let me know if I can be of help.

Sincerely,

COLLECTION--REMINDER OF LOAN PAYMENT DUE (COL2)

Key Items: friendly tone; show no concern

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

The payment on (your travel loan) is now delinquent. We are sure it was simply overlooked.

May we have your check by return mail please. (An envelope is enclosed for your convenience.)

Sincerely,

COLLECTION--REQUESTING PAST DUE PAYMENT (COL3)

Key Items: remind about seriousness; offer help.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

The payment on your (travel loan) is (twenty days) overdue, and another payment will soon be due. If some problem is preventing your making payment, please let me know by telephone or by writing a note on the back of this letter and returning it in the enclosed envelope.

Otherwise, may we have your check right away.

Sincerely,

COLLECTION--REQUESTING A SERIOUSLY PAST DUE PAYMENT (PRIDE APPEAL) (COL4)

Key items: Appeal to fair play or pride, payment insisted

(date)

(name)
(address)
(city, state, ZIP)

Dear ():

The condition of your (travel loan) account is now serious. We (made the loan) based on your promise to pay and on your seemingly sound financial status.

Yet, after asking (twice) for payment, we have (heard nothing). Isn't your pride in your personal reputation worth protecting by making payment?

Do so now while this letter is before you.

Sincerely yours,

COLLECTION--ULTIMATUM (COL5)

Key items: Review problem, state consequences of non-payment

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

When an account reaches the critical stage in which your (travel account) is, we often turn it over to our legal department for collection. But we do like to give a person a last chance to avoid the costs and time of legal action.

Therefore, you have (ten days) from the date on this letter to settle your account. After that, we will use every legal means possible to enforce payment.

Yours truly,

COLLECTION--PERSONALIZED REMINDER (COL6)

Key items: Friendly tone, show no concern

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

The payment on your (travel loan) is now past due, and I am sure it was simply overlooked.

May we have your check by return mail, (Mr. Jones). An envelope is enclosed for your convenience.

Sincerely,

COLLECTION--PERSONALIZED INQUIRY (COL7)

Key items: Use name, offer help, reader must pay or explain
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

The (June 15) payment on your account is long past due, and the (July) payment will soon be due.

Because we haven't heard from you, we can only assume that something is wrong, (Miss Smith). If you have a problem, won't you phone me or write a short note on the back of this letter. We'd like to help.

Otherwise, we must expect your check by return mail.

Cordially,

COLLECTIONS--PERSONALIZED APPEAL (COL8)

Key Items: Recall specific details, use name, use appeal
(date)

(name)
(company)
(address)
(city ,state, zip)

Dear ():

The condition of your account is becoming critical. Although we do not know what has prevented payment, we do know that your credit reputation was excellent when the loan was made. We had no doubt about your willingness and ability to pay.

Now, however, (Miss Smith), we wonder whether you recognize what that credit reputation is really worth. You worked hard to earn it, and you can lose it quickly.

Won't you restore our confidence in you and also maintain your credit record in the "excellent" category by sending your check in the envelope enclosed. We'll both feel better.

Very sincerely,

COLLECTION--PERSONALIZED ULTIMATUM (COL9)

Key items: Use name, use "last chance" tone

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

The very serious status of your account makes me wonder why our confidence in you was misplaced.

After several attempts to have you at least explain your problem to us, we still have not a single word from you. Now we have no alternative but to insist on payment by (August 5). If we do not hear from you by that date, we will turn your account over to our legal department to take whatever legal means necessary to enforce payment.

Legal action is often expensive and embarrassing. This is your last chance to avoid it, (Miss Smith).

Sincerely yours,

COLLECTION ULTIMATUM TO NOTE CO-MAKER (COL10)

Key Items: Recall co-maker agreement, insist on payment

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

(Charles Jones), whose note you signed as co-maker, has failed to make payments as agreed. Therefore, we have no alternative but to ask you to assume the obligation.

Will you please send (\$100) to this office to cover the delinquent payments and arrange to send (\$50) on the (first) of each month until the account is cleared in (twenty months).

Sincerely,

COLLECTIONS - LEGAL ACTION NOTICE (COL11)

Key Items: Give notice of legal action

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

This morning your account was turned over to our legal department for collection.

You should be hearing from them or from the courts soon.

Sincerely,

COLLECTIONS--LATE PAYOR/CHANGE OF DUE DATE (COL12)

Key Items: Thanks for late payments, offer date change

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Thank you for your (March 15) payment which was received yesterday, (April 1).

We are certainly satisfied with the regularity of your payments, but we do wonder if a different due date would be more convenient simply because your payments are normally made around the (first) of each month.

If a change to the first would enable you to meet your payments on time, make a notation to that effect at the bottom of this letter and return it to me promptly. Otherwise, please make your payments on the (15th) as scheduled.

Cordially,

COLLECTIONS--PAYOR ALWAYS ONE MONTH LATE (COL13)

Key Items: Review situation, offer one month extension

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Your (June 1) payment was received today, (July 1). Although we are glad to get this payment, we are concerned about the (July) payment which is now due.

To avoid collection problems, please make this payment promptly. If payment is difficult at this time, we suggest that you ask for a one-month extension (on your loan). This would put your payments back on schedule and enable us to put your account back in the good-pay file.

To do this, you should (attach the late charge of \$5, covering the interest payment for one month, to this letter and return it to me promptly).

Sincerely,

COLLECTIONS--PERSISTENT LATE TAKER OF DISCOUNT (COL14)

Key Items: Thanks for payment, demand prompt pay

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

We are pleased to list you among our (most prominent retail outlets). But we are not so pleased about your handling of the discount privilege.

The (2) percent is given for payment within (10) days of (the first of the month). Payments received in this period enable us to take advantage of discounts on our own obligations and reduce bank borrowing.

In fairness to our other customers as well as to us, we ask you to observe the discount rules. In a mutually cooperative spirit, please send your check for (\$65.50) for discounts taken after the (ten-day) period. This payment will balance your account.

Sincerely,

COLLECTIONS--ONE-TIME DISCOUNT VIOLATION (COL15)

Key Items: Reminder of discount taken on late payment

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

The additional amount of (\$36.26) on this month's bill represents the discount you may have inadvertently deducted when you paid your last bill after the discount period.

Please include it in your payment.

Sincerely yours,

COMPLAINTS--UNSATISFACTORY SERVICE (CPL1)

Key Items: Lay it on the line

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(For the past six months we have had almost nothing but late deliveries from your company on repair parts. This unfortunate situation has caused us much embarrassment and even the loss of some valued customers.)

(We must find a solution to this problem. Will you let me know immediately what can be done to correct the situation. (If we can't have deliveries on a scheduled basis, we will have no other option than to seek another supplier.)

May I hear from you within a week. Thanks very much.

Sincerely,

COMPLAINTS--INCOMPLETE SHIPMENT (CPL2)

Key Items: Review problems, ask for action

(date)

(name)

(company)

(city, state, ZIP)

Dear ():

(Today we received the forty training packets for the certified financial planner program. As I told your secretary on the phone, however, the instructor's manual and set of overhead transparencies were not included.)

(We covered the first class without these items, but it was a difficult task. The next class meeting is one week from today--on September 18. Will you please investigate and make certain the missing materials are sent in time to reach us before that day even if they have to be sent by overnight express. Thanks.)

Sincerely,

COMPLAINTS--INCORRECT BILLING (CPL3)

Key Items: Review situation; indicate action

(date)

(name)

(company)

(address)

(city, state, ZIP.)

Dear ():

We have just received your (May 15) invoice No. (A2-4837) for (\$870.00) for (five 4-drawer Steelcase filing cabinets).

(We received four of the cabinets, the number we ordered and signed for on receipt. The amount of the invoice should be \$625.50.)

(I am returning invoice No. A2-4837. On receipt of corrected invoice, I will be happy to process payment.)

Sincerely,

COMPLAINT-UNSATISFACTORY EMPLOYEE (CPL4)

Key Items: State the action, review situations

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Please send a replacement for (John Burton, the part-time lithograph operator) you sent from your agency last week.

(Mr. Burton is technically competent, but he pays little attention to scheduled work hours. After working the first full day, he has missed one complete day and three half days. As a result, his backlog of work is holding things up in many parts of our organization.)

I'd appreciate a phone call from you right away to discuss (Mr. Burton's) problems as well as the qualifications of his replacement.

Sincerely,

COMPLAINTSINVOICE FOR ONE PREVIOUSLY PAID (CPL5)

Key Items: Return duplicate, explain details

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

I am returning your invoice No. (41-666 for \$121.50 for one case of 20 lb. copying paper).

The invoice was obviously sent in error because we paid by our check (\$11765 on April 20). A photocopy of the cashed check, front and back, is enclosed. Please correct your records to show the account paid. Thank you.

Sincerely,

ROUTINE REQUEST FOR CREDIT (CRD1)

Key Items: Request first, follow with details

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Will you please fill the enclosed order on a credit basis?

If you need information other than that given on the enclosed financial statements, please write or phone me.

(Current plans are to place a similar order every two weeks.)

Sincerely,

REPLYING TO A REQUEST FOR CREDIT (APPROVED) (CRD2)

Key Items: Approve, pay a compliment, explain terms

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

We are pleased to extend credit privileges to you. (Temporarily) you may purchase up to (\$1500) on time each month. Our credit terms are (2/10, net 30).

We welcome you as a customer, and we look forward to serving your needs promptly and efficiently.

Sincerely,

APPROVING CREDIT WITH SALES POSSIBILITIES (CRD3)

Key Items: Approve, include details, add sales promotion

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

(The popular, easy-to-hang Christmas lights should reach your store next week in time to display them the day after Thanksgiving.) You can pay us later.

Because of the excellent reports we received from your references, we are sending the shipment subject to the usual credit terms of (2/10, net 30). (By taking advantage of the discount, you jump your markup to 46 percent.)

(As a suggestion, you can encourage purchases by using a set of lights in the sales area. See the enclosed brochure for some ideas.)

I'm also enclosing a (brochure) of all our current products that you might stock (for the spring and summer garden seasons). We'll be glad to work with you.

Sincerely,

DECLINING A COMMERCIAL CREDIT APPLICATION (CRD4)

Key Items: Neutral opening, explain facts, say no, end with a forward look

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Thank you for applying for credit and for sending us your financial statements.

Our requirements call for (a current ratio of 2:1, and the financial statements show only a ratio of 1:1. Until such time as your ratio reaches the 2:1, we would prefer to continue serving you on a C.O.D. basis).

(You may be interested in reviewing our new revised discounts for cash payment table which is enclosed.) We do look forward to serving you.

Sincerely,

REJECTING A CONSUMER CREDIT APPLICATION (CRD5)

Key Items: Neutral opening, explanation, refusal, alternative
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Thank you for applying for a (Broadway) credit card.

Our routine credit check indicated that (you have several past due credit charges in the local area). Until such time as (these have been cleared), we believe it would be better for both of us to continue our past relationship.

(Of course, you can continue to use your major credit cards at the Broadway. We honor Visa, Master Charge, and American Express cards in addition to our own.)

Sincerely,

REQUESTING INFORMATION ABOUT CREDIT APPLICANT (CRD6)

Key Items: Request information, tabulate data needed
(date)

(name)
(company)
(address)
(city, state, ZIP)

Subject: Request for Credit Information about (F.J. James)

May we have credit information about (Mr. F.J. James)? He has applied for credit with us and has given your business as a credit reference.

After filling in the blanks on this page, use the back for additional remarks if necessary. Your reply will be held in strict confidence.

Length of time sold on credit _____
Highest credit extended _____
Credit Limit _____
Balance now due _____ Past due _____
Normal paying habits _____
Remarks _____

Thank you for your help. Please call on us for similar assistance.

Sincerely,

REPLY TO A CREDIT INFORMATION REQUEST (CRD7)

Key Items: Concise, factual, courteous close

(date)

(name)

(company)

(address)

(city, state, ZIP)

Subject: Credit Information on (F.J. James)

We consider (Mr. F.J. James), about whom you requested confidential credit information on (June 1), as a (very good) credit risk.

During (his ten years) as our customer, (his) highest balance was (\$7,000). (His) payments are made (promptly), and (his) account currently has (zero) balance.

(Mr. James) is a (good) customer, (friendly), and a (pleasure) to do business with.

Sincerely,

EMPLOYEE EVALUATION MEMORANDUM (EMP1)

Key Items: Clear, concise, well organized

Date: ()

To: ()

From: ()

Subject: (Charlotte Raye)- Performance Evaluation

Here's the performance evaluation of (Charlotte Raye) you requested. Attached are the detailed evaluation check lists covering (her) education, job skills, and personal characteristics.

Education: (Ms. Raye is a high school and community college graduate. Her emphasis has been on office administration courses including shorthand, business communication, business english, and word processing.)

Job Skills: (Ms. Raye has excellent English skills, above average word-processing competency, but relatively poor oral communication skill.)

Personal Characteristics: (Ms. Raye is pleasant and well groomed. She is a quiet, efficient worker with the ability to work well on detailed tasks. Her accuracy is excellent. She appears to prefer working alone rather than in roles where interpersonal skills are necessary.)

Summary: (Ms. Raye is a good employee with well-above-average skills and abilities. She should be retained and placed in jobs where these individual skills are appropriate.)

CONGRATULATING A RELUCTANT RETIREE (EMP2)

Key Items: Don't dwell on negatives, be slightly formal

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

After (45) years of devoted effort and (sound leadership) at (Avco), you certainly have earned the opportunity to take on whatever new challenges you wish.

(When you started, Avco was a struggling organization with only three offices. Now it is over 200 offices strong, and you can take great pride in your part in bringing this growth about. And you grew along with the company...sort of proved the old adage about the boy picking up the calf everyday even though it grew into a massive bull.)

I know you will find many opportunities to use your energies and know-how in constructive ways. (You've been a good friend, and I've gained comfort knowing that you have been near when I've needed your counsel.)

My every good wish for health, happiness, and prosperity in the coming years.

Sincerely,

TERMINATING AN EMPLOYEE BY LETTER (EMP3)

Key Items: Review facts, then terminate

(date)

(name)

(address)

(city, state, ZIP)

Dear ():

Although I have tried to call you at home (and at the hotels listed on your itinerary), I have been unable to locate you. Therefore, I am sending this registered letter to your home.

(We have had several discussions about your maintaining your commitments to customers and prospects. Records of these discussions are in your personnel file.)

(Today I received two telephone calls from Salt Lake City where you are scheduled to be. Both dealers complained that this is not the first time you had failed to keep appointments. I told them I would visit them Monday morning.)

I wish this notification were not necessary, (Harmon), but your termination from the company will be effective on (April 15). (Your severance check covering the standard 15 days of salary will be sent to your home within five days.)

Sincerely,

TERMINATION CONFIRMATION (EMP4)

Key Items: Recall discussion, confirm termination

(date)

(name)

(address)

(city, state, ZIP)

Dear ():

This registered letter confirms our discussion of (August 29) and your termination of employment with (Abdec) effective (September 4).

Please return your (company car to the attendant at the parking area behind the main building on or before September 4). (A check for your salary through September 4 plus the standard two weeks' termination pay will be available at the Personnel Office on the 4th.)

Sincerely,

JOB APPLICATIONS--NO POSITION AVAILABLE (EMP5)

Key Items: Express thanks, explain, look forward

(date)

(name)

(address)

(city, state, ZIP)

Dear ():

Thank you for your application for the position of (computer operations analyst).

Although we have no vacancies at present, the situation could change at any time. Therefore, I will keep your application handy in case we do have an opening soon.

In the meantime, of course, I do hope you have success in your job search.

Sincerely,

REFERENCE MESSAGE ABOUT UNSATISFACTORY FORMER EMPLOYEE (EMP6)

Key Items: Confirm employment dates, explain

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(Edward Garcia) worked under my supervision for about (22 months) in (1982 and 1983 as a (file clerk).

(Although he has a good mind and is quick to learn, Mr. Garcia had some problems of absenteeism and general attitude. After working with him for some time on these problems, I suggested that he attempt to find other employment. We really did not have an opening available in a more challenging job.)

(He is simply too well educated and too bright to be working in a routine clerical job. Work that will be of interest to him might well lead to success. If I can be of further help, please telephone me.)

Sincerely,

GRANTING A JOB INTERVIEW (EMP7)

Key Items: Acknowledge application, give specifics

(date)

(name)

(address)

(city, state, ZIP)

Dear ()::

Thank you for submitting your resume. I would like to arrange for a personal interview for you (with Mr. Fred Johnson, our Director of Office Personnel).

Could you please come in on (Thursday morning, September 1, at 10:30 a.m.). (Mr. Johnson's office is Room 2121 in our 5670 Wilshire building.) Please telephone me at (667-7800) if you are unable to come at that time. Otherwise, we'll look forward to seeing you.

Sincerely,

COMPLIMENTING AN EMPLOYEE (EMP8)

Key Items: Compliment and encourage

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

(You made an excellent presentation to the visiting committee on Tuesday.)

I want you to know how much I appreciate the extra effort and time it must have taken to (assemble and organize the material in such a meaningful way).

Please accept my warm thanks for doing such a splendid job.

Most sincerely,

SUGGESTING IMPROVED EMPLOYEE PERFORMANCE (EMP9)

Key Items: Explain need, avoid accusing "you" tone

(date)

To: ()

From: ()

Subject: (Sales Presentation to XYZ Company)

(Your presentation to representatives of the XYZ Company yesterday was thorough and clear to me.)

(I believe the XYZ people could have been more involved, however. As you recall, they were hesitant to ask questions perhaps because they may have felt they would look foolish.)

(As a suggestion for getting prospects more involved in the future, I believe the presentation should be less technical and include much more hands-on experience with the machine. If you'd like assistance in toning down or restructuring the presentation, please let me know.)

DEMANDING IMPROVED EMPLOYEE PERFORMANCE (EMP10)

Key Items: Avoid too much accusing tone, stress urgency

(date)

To: ()

From: ()

Subject: (Sales Presentation to XYZ Company)

(Following your presentation to representatives of the XYZ Company yesterday, two of them commented to me that they were disappointed by the lack of opportunities to ask questions, by the highly technical nature of the presentation, and by the failure to give them some hands-on experience with the machine.)

(We must have the presentation considerably improved before the ABC people visit us next week. Can you do it? Although you have not used our training consultant before, I strongly suggest that you do so. She can be extremely helpful.)

RECORD AN EMPLOYEE REPRIMAND IN PERSONNEL FILE (EMP11)

Key Items: Memo after conference, state problem and action taken
For Personnel File of (Jane Walters)

(Jane Walters, word processing operator, was late for work an average of 15 minutes on June 11, 12, 13, and 15. She was absent without explanation on June 14.)

(Her tardiness was explained as something that happened because she overslept.)

(The problem was discussed with Ms. Walters in my office on June 15, and she understands the necessity of including this memorandum in her personnel file.)

CONGRATULATING AN EMPLOYEE ON A SUGGESTION (EMP12)

Key Items: Congratulate, mention suggestion, close warmly

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Congratulations on your receiving a (\$250 award) for your suggestion (providing employees with an incentive for soliciting new savings accounts.)

The (Executive Committee) has adopted the suggestion (almost) exactly as you proposed it. (Approval by the appropriate Board committee is practically assured.)

(We plan to announce the program and to put it into effect on January 1. I am impressed by your creativity and by your skill in putting the procedure together.)

I hope you will continue to provide suggestions, which are rewarding for you and for the (credit union).

Cordially,

CONGRATULATING A HAPPY EMPLOYEE ON RETIREMENT (EMP13)

Key Items: Keep it light, wish happiness

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

(Golly, Ernie, I knew you had wanderlust in your heart, but little did I guess how much until I saw the luggage and the two round-trip tickets presented to you and Marge at the retirement dinner last night.)

(The Australia-New Zealand trip is going to be the first of many, I'm sure. If you can find time in your travels to miss us here at the old grind, drop us a line.)

We're sure going to miss you. Happy travels!

Warm personal wishes,

NOTIFYING EMPLOYEES OF THE RETIREMENT OF A COLLEAGUE (EMP14)

Key Items: Announce the retirement, pay compliments

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear (Californian):

After (thirty five) years with (California Bank),(William Hutton), our (Director of Personnel) for the past (twenty) years will retire on (December 31).

(Most of you will recall your employment interviews with Bill, and all of us will be thankful to him for the many times he solved problems and resolved strong differences for us.)

(At his retirement dinner hosted by his personnel staff, Bill said he was chomping at the bit to head for his new home at Desert Country Club. He'll always be within reach should we need him.)

I hope you'll join me in wishing (him) a happy, healthful retirement.

Sincerely,

THANKING EMPLOYEES WITH AN ADDITIONAL VACATION DAY (EMP15)

Key Items: Mention the reason, add details

(date)

To: (All Employees)

From: ()

Subject: Additional vacation day

As we near the end of (the most productive and profitable year in the history of Wesson Industries), I thank you for all you have done to make this year (memorable).

In recognition of (our mutual achievement, the Board of Directors) has approved one additional vacation day for every employee. You may select any day between (January 2 and June 30) that is approved by your immediate supervisor.

Again, my sincere thanks to everyone and best wishes for a healthful and happy (1984).

ASKING FOR EMPLOYEE COOPERATION (EMP16)

Key Items: Describe problem, ask for cooperation

(date)

To:

From:

Subject: (Street Resurfacing and Painting)

(The City Department of Streets will be resurfacing Main Boulevard and 7th Street on Wednesday, Thursday, and Friday, October 8, 9, and 10. We have been asked not to attempt to use those streets during that time.)

(Although this will be an inconvenience, the result will be a far more attractive set of streets on the main approaches to the plant. Please plan to park on other than these streets. The City has suggested using 6th Street to Houser Boulevard for entrance to our facility. During this time, we have been given permission to park on both sides of Houser Boulevard.)

Your cooperation in following these suggestions is appreciated. (We want the job to be completed as quickly as possible.)

CONGRATULATING EMPLOYEES ON YEARS OF SERVICE (EMP17)

Key Items: Congratulate, review details, thank the employee

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Congratulations on being one of the (26) people who will celebrate (ten) years with (Norris Industries) at the (awards dinner on December 13).

You have seen the company grow from (one with sales of \$1.4 million to over \$80 million) and from (110) employees to over (2000). This growth didn't occur by accident. It resulted from the dedicated efforts of "pioneers" like you.

My very warmest appreciation goes to you (Mabel). I look forward to giving you proper recognition on (December 13).

Cordially yours,

ACCEPTING A FORMAL INVITATION (INV1)

Key Items: Use formal style

(date)

(name)

(company)

(address)

(city, state, ZIP)

(Mr. and Mrs. Roger C. Anderson) accept with pleasure the kind invitation (of the Board of Directors of the California Investment Companies) for (dinner) on (Saturday, the twelfth of June, at seven-thirty o'clock).

DECLINING A FORMAL INVITATION (INV2)

Key Items: Use formal style

(date)

(name)

(company)

(address)

(city, state, ZIP)

(Mr. and Mrs. Roger C. Anderson) regret they are unable to accept the kind invitation of (the Board of Directors of the California Investment Companies) to (dinner) on (Saturday, the twelfth of June).

INVITATION - FORMAL (INV3)

Key Items: Use formal format

(The Board of Directors
California Investment Companies)
Request the Company of
(Mr. and Mrs. Roger C. Anderson
at dinner)
On (Saturday, the twelfth of
June) at (seven-thirty o'clock
Versailles Room, Baltimore Hotel
Milford, Connecticut)

(Black Tie)

R. S. V. P.

INVITATION TO LUNCHEON (INV4)

Key Items: Invite, provide details, ask for confirmation

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(On Friday, October 20, at noon in the Harvard Court of the Biltmore, the National Conference of writers will hold its bi-monthly meeting. I'd like you to be my guest.)

(The featured speaker will be Robert G. Ingersol of Illinois. As you know, Mr. Ingersol has strong support to take the number two spot on the democratic ticket next year. The talk should be interesting no matter which side we are on.)

Let me know if you can join me, (Bill). I look forward to seeing you.

Cordially,

INVITATION TO JOIN A PROFESSIONAL ORGANIZATION (INV5)

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ()::

The Thomas Paine Society is a (new) organization devoted to (promotion of private enterprise) and to the (promotion of non-interventionism).

(As an alumnus), you are cordially invited to join the organization. Our first meeting will be (a dinner at the Biltmore Hotel, Sun Room, at 6p.m. on Tuesday, September 4).

(For the fellowship and the outstanding programs planned, dues are only \$50 a year--and this includes the cost of two semi-annual dinner meetings. Your time commitment may be minimal.)

We will look forward to receiving your completed application. (Even if you are unable to attend the dinner meeting, a membership plaque will be sent to you.)

Sincerely,

REPLYING TO INVITATIONS (ACCEPTANCE) (INV6)

Key Items: Accept with pleasure, keep message short

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ()::

(Mrs. Smith and I) accept with pleasure your kind invitation to attend the (Installation Ball of the Chamber of Commerce).

(We) look forward to the (evening).

Sincerely,

REPLYING TO INVITATIONS (REFUSAL) (INV7)

Key Items: Extend thanks, explain, refuse, close gracefully

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Thank you very much for your kind invitation to (the Chamber's Installation Ball).

Because (Mrs. Smith and I will be out of town on business, we'll) be unable to attend. (I do hope you will extend our best wishes to Bob Dodson on his election), and I look forward to seeing you soon.

Cordially,

WRITING INVITATIONS TO EVENTS (INV8)

Key Items: Explain purpose, specify details

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

(As was recently announced, Robert Dodson, our Executive Vice President, will serve as president of the Chamber of Commerce for the coming year.)

We are pleased to invite you to be our guests at the (Installation Ball of the Chamber at the Beachrider Hotel on January 5.) (A reception at seven o'clock will be followed by dinner and dancing.)

Will you please let me know by (December 15) whether you will attend. I will be glad to see you there.

Cordially,

JOB APPLICATIONS--RESUME INSTRUCTIONS AND OUTLINE (JOB1)

Key Items: Plan carefully to reveal strengths

Keep your personal resume up to date. It should be organized by major headings such as:

Work Experience

List latest job first. Listing may include only job title, employer, dates. Or it may include job responsibilities and personal achievements on the job.

Education

List highest level of education first. Include pre-college study as an option. If education relates to the job applied for, list courses and major and minor areas of emphasis. Include special seminars and training programs attended.

Scholarships, special recognition, or other awards received are highlights which can make your education stand out from the crowd.

Civic and Professional Activities

Section may be expanded to include college activities--fraternity, clubs, athletics, leadership roles.

Personal Interests and Hobbies

Personal Profile

Health, age, family, home ownership, willingness to travel or change locations.

References

References may be listed or they may be omitted and a notation made "References available on request."

Special note: Education and work experience may be reversed if education is a stronger qualification than work experience.

JOB APPLICATION--LETTER REQUESTING A POSITION CHANGE (JOB2)

Key Items: Interpret qualities for reader benefit

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(When Charles Jones told me of your plans to establish a sales office for Software Sales in the Seattle area, I jumped at the chance to submit this application. I have several relatives and friends in the Northwest.)

(More importantly, of course, I have the background in computer-related sales and the administrative experience to handle the job with a minimum of training. Your products are well known to me, because I've had the problem of trying to compete with you for the past five years in the Bay Area.)

(Additionally, my studies in the M. B. A. program were primarily directed toward sales and sales management. I learned how to plan sales strategies, how to design dynamic sales presentations, and how to deal with a variety of customer questions.)

(As you can see from the enclosed resume, I am ready to take on a new challenge. My time with the Orcutt Company has been most productive and provided me with the opportunity to grow in terms of management experience and in educational depth.)

(I will appreciate your calling me for an interview at your convenience. I'd like to show you that I have much to offer.)

Sincerely,

JOB APPLICATIONS--RESUME FOR POSITION CHANGE (JOB3)

Key Items: Emphasize strongest qualifications first

(Introducing
Homer T. Anderson)

(1555 Elm Street San Francisco, Ca. 94022 (605)213-1122)

Progressive Employment Responsibilities

- (Sales Manager , The Orcutt Company, 1982 to present.
Supervised sales efforts of 16 regional sales representatives in six western states. During this time, sales of computer-related products of Orcutt increased over 40 percent.)
- (Regional Sales Representative, The Orcutt Company, 1978-1982.
Sold computer-related products in the San Francisco Bay area. Conducted training sessions after sales. Gave seminars for secondary school teachers as a part of the sales effort.)
- (Instructor, Control Data Institute, 1976-78, Los Angeles.
Taught advanced programming and computer applications.)

Education for Management

- (M. B. A., University of San Francisco, 1981. Major in general management with emphasis on sales management. Part-time evening program.)
- (B. S., Fresno State University, 1976. Major in computer sciences; minors in mathematics and psychology.)
- (Public elementary and secondary school education in Clovis, California.)

Personal Points of Interest

(Thirty years of age, excellent health, married, one child. Interests and hobbies include live theater, acting, tennis, woodcrafts).

References available on request.

JOB APPLICATIONS--RESUME FOR NEW COLLEGE GRADUATE (JOB4)

Key Items: Emphasize education, show personal qualities

(Walter J. Smith)

(1555 Elm Street San Francisco, Ca. 94022 (605)213-1122)

Job Objective: (To obtain a position in product sales.)

Education

(B. S., Sales Management and Marketing, North Missouri State College, June 1984.)

(A. A., General Education, Nickel City Community College, June 1982.)

(Secondary and Elementary schools, Nickel City, Missouri, 1970-80.)

Activities Involving Working with Others

(Student Body President, NMSC, 1983-84.
Student Body Vice President, NMSC, 1982-83.
Chairman, Career Day, Nickel City CC, 1982.
Rush Chairman, Phi Kappa Phi Fraternity, Fall 1983;
Social Chairman, Spring 1983.
Volunteer worker, Nickel City Hospital, 1979-1981.)

Work Experience (all part time)

(Cook, McDonalds in Nickel City, 1981-82.
Laborer, Missouri Department of Highways, Summer of 1982 and 1983.)

Personal Data

(Eagle Scout; Varsity Football and Track Teams at Nickel City High; Assistant Scoutmaster, Troop 79;
Rotary Club Speech Winner, 1980;
interested in team sports, historical novels, computer programming. Good health, 6' tall, 180 pounds, 22 years of age.)

References available on request.

JOB APPLICATIONS--THANKS AFTER REJECTION (JOB5)

Key Items: Express thanks, add details

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

I very much appreciated your taking time to talk with me last week about the job in your (MIS Division).

(As you suggested, I'm enrolling in a course in systems analysis.) When my qualifications are improved, I will call on you again. You were nice to consider me at this time.

Sincerely,

JOB APPLICATION--LETTER BY NEW COLLEGE GRADUATE (JOB6)

Key Items: Show how qualities apply to job

(date)

(name)

(address)

(city, state, ZIP)

(phone)

Dear ():

(When you look for someone who likes people and who also likes the challenge of selling in face-to-face situations, do you also look for someone who has a record of past achievements? I'm such a person.)

(From my teenage days as a leader in the Boy Scouts through my college years at North Missouri State College, I found it easy to work with and for people. During my last year of college, I learned to organize and administer a student body budget of over \$300,000. As student body president, I had to interface with a variety of college administrators; and this experience taught me a lot about how to get my points across even with people many years older than I.)

(My sales management and marketing major courses pretty well convinced me that my strengths were in areas critical to the selling process--adapting presentations to prospects' needs, planning time carefully, and knowing when to ask for an order.)

(As you can see by the enclosed resume, most of my first 22 years have been spent in people-related activities and in preparing for a selling career. Whether you call or write, I welcome a chance to discuss the possibilities of putting my skills to work for you.)

Sincerely,

JOB APPLICATIONS--REFUSAL OF OFFER (JOB7)

Key Items: Neutral beginning, explain, refuse, express thanks
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Your offer of a position in the (cost accounting department) was most welcome, because it led me to do considerable soul searching and personal evaluation.

Because my primary interest has long been in (the area of taxation), I have taken a job with the (corporate tax department of Pacific Manufacturing where I'll devote full time to tax work).

I do appreciate the time you devoted to me.

Most Sincerely,

JOB APPLICATIONS--THANKS FOR AN EMPLOYMENT REFERENCE (JOB8)

Key Items: Thanks, details, close graciously
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Your letter of recommendation to (the Ajax Corporation) was so effective that I have been offered the position of (Audit Manager), and I will accept this offer (today).

Thanks for all your help. I really appreciate it.

Sincerely,

JOB APPLICATIONS--ACCEPTANCE OF OFFER (JOB9)

Key Items: Accept with pleasure, add details

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

Yes! I accept your offer to (join your audit staff as an audit manager).

(Here are the health forms, bonding papers, and a copy of my birth certificate as you requested.)

I enjoyed meeting (some of the audit staff) when I visited your office (last week). (I look forward to working with them beginning July 1.)

Sincerely,

JOB APPLICATION--FOLLOW-UP REMINDER (JOB10)

Key Items: Show continued interest and new qualifications

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

Since I wrote you about a job (on your audit staff), I have received my (C. P. A. certificate and have been promoted to Audit Senior with Price Waterhouse.)

But I am still interested in joining your firm. Please keep my application in the active file and let me know when the possibility of an opening exists.

Sincerely,

JOB APPLICATIONS--REQUEST FOR JOB APPLICATION (JOB11)

Key Items: Request first; fill in details

(date)

(name)

(company)

(address)

(city, state, ZIP)

Subject: Request for Job Application

May I please have an application form for work in your (appraisal department)? (I have just completed all work and test requirements for the M. A. I. certificate and plan to move to Los Angeles in the near future.)

Sincerely yours,

JOB APPLICATIONS--NOTIFYING APPLICANT OF INTERVIEW (JOB12)

Key Items: Inform time, add details, look forward

(date)

(name)

(address)

(city, state, ZIP)

Dear ():

I would like you to come in for an interview about the position (in our (word processing department) on (Tuesday, August 4), at (2 p.m.).

We are interviewing just a few of the many applicants before making our decision. If you are not able to keep the appointment, please call (Miss Jones) at (746-2439). I look forward to meeting you.

Sincerely,

JOB APPLICATIONS--CONFIRMING AN INTERVIEW APPOINTMENT (JOB13)

Key Items: Accept, show enthusiasm, look forward

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

I will be at your office by (10:30 a.m.) on (Thursday, August 1), as you suggested. I'm very pleased to know that I'm one of the few applicants to reach the interview stage.

I look forward to meeting you and to the possibility of becoming a (member of the Calfed team).

Most sincerely,

JOB APPLICATIONS--REFUSING TO PROVIDE REFERENCE (JOB14)

Key Items: Review, refuse, close gracefully

(date)

(name)

(address)

(city, state, ZIP)

Dear ():

Because your employment record with us was not satisfactory, I believe our policy of not giving letters of reference in such situations serves as a protection for you and for us.

Nevertheless, I do wish you success in finding a more satisfying job elsewhere.

Sincerely,

JOB APPLICATIONS--REQUESTING INFORMATION ABOUT APPLICANT (JOB15)

Key Items: Seek factual data. Usa an outline.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Subject: Information about (Gertrude Norris)

(Gertrude Norris) is an applicant for a (stenographic position) with us and has listed you as a former employer. Will you please take a moment to answer the following questions.

How long under your supervision? ()

Reason for leaving? ()

Overall competence? Good Average Poor

Would you rehire her? ()

Your reply will be held in strict confidence, and (Ms. Norris has given a waiver on her rights to review her recommendation). Thanks very much.

Sincerely

JOB APPLICATIONS--ASKING FOR MORE INFORMATION (JOB16)

Key Items: Acknowledge application; ask for information

(date)

(name)
(address)
(city, state, ZIP)

Dear ():

I have reviewed your application for employment (in our internal audit department).

(Certainly, your educational background and bookkeeping experience are impressive. However, I found no mention of internal audit experience. As you'll recall, the advertisement called for two years of experience.)

If an oversight caused the omission of the (experience requirement), please let me know promptly.

Sincerely,

JOB APPLICATIONS--REJECTING AN UNQUALIFIED APPLICANT (JOB17)

Key Items: Neutral opening, imply rejection, close with thanks

(date)

(name)

(address)

(city, state, ZIP)

Dear ():

I appreciate your interest in the position of (computer programmer).

Your application is one of many we have received. Some are from highly qualified people with (several years) of experience. However, we will make a decision only after the (August 1) deadline for applying has passed.

If you do not hear from us by (August 10), you should assume the job has been filled.

Thanks again for applying.

Sincerely,

JOB APPLICATIONS--NEWS RELEASE ON HIGH-LEVEL APPOINTMENT (JOB18)

Key Items: Name appointee and position, give appointee's background, state new duties and responsibilities

(California Savings & Loan Assn.
Contact; R.J. Fuller
(213) 741-2444)

(For Immediate Release
September 1, 1984)

(George Terhune, former executive vice president of Watson Trust and Savings Bank, has joined California Savings and Loan as executive vice president and chief operating officer. He will assume duties on September 16.)

(Prior to joining Watson Trust, Terhune served in various banking and governmental positions including Assistant Undersecretary of the Treasury Department from 1968-72.)

(According to Chairman and Chief Executive Officer, Malcome Smith, Terhune will have primary responsibility for the initiation of commercial lending and credit card functions, which are new to California Savings. He will also be in charge of the extensive branch office network of the association.)

**JOB APPLICATIONS--REJECTING APPLICANT BASED ON TEST SCORES
(JOB19)**

Key Items: Neutral opening, review test results, close with a suggestion

(date)

(name)

(address)

(city, state, ZIP)

Dear ()::

We have completed our evaluation of the (performance test for word-processing applicants).

(You have a report of your test results. For the 27 people who took the test, the average typewriting speed was 73 words a minute; the average spelling score was 96 percent.)

(Should you still plan to work in word processing, I suggest that you enroll in a short course at one of the local business colleges to increase your typing speed and brush up on your spelling. Such a program also may reduce the stress that often accompanies test taking.) Best wishes.

Sincerely,

ANNOUNCING TRAINING PROGRAM (MCL1)

Key Items: Announce the program, ask for interest.

Date: ()

To: ()

From: ()

Subject: (Written Communication Seminar)

(On Friday and Saturday, October 19 and 20, a seminar in written communication in industry will be held at State University. The University staff will conduct the seminar. Content is described in the attached brochure.)

(I would appreciate your letting me know promptly if any of your staff should attend. If enough interest is shown, we will pay the registration fees at the group rates shown in the brochure. I, personally, believe it will be a high-quality program.)

NEWS RELEASE (MCL2)

Key Items: What, when, where, why, who, etc.

For Immediate Release

**Contact: H. J. Myers
463-2133**

(California Bank announces the grand opening of its Mirror Hills office at 1433 Brand Boulevard on June 14.)

This opening represents the entrance of California Bank in Lake County. Ribbon cutting ceremonies will take place at 10:00 a.m. June 14, and the public is invited to visit the bank at that time. Entertainment and refreshments will be provided.

(Bob Hills, a long-time resident of Mirror Hills and formerly with Mercury Savings, will be Vice President and General Manager of the new facility. California Bank is the fourth largest bank in the state with assets in excess of \$40 million and 120 offices statewide.)

INTRODUCING A BUSINESS ASSOCIATE OR FRIEND (MCL3)

Key Items: Introduce, give personal details, give reason.

(date)

(name)

(company)

(city, state, ZIP)

Dear ():

It's my pleasure to introduce (Harvey Jones) to you. (He) is the (new controller) for our firm, and I want to have him meet with you personally to (get some views about us from your point of view as the outside auditor).

(Harvey is an aggressive, yet congenial, person with a Harvard M. B. A. as well as a C. P. A. He came to us after several years with Northwest Insurance where he held the post as Senior Vice President and Treasurer.)

(He) will call you (within the next few days). I'd appreciate any courtesies you can extend to (him).

Cordially,

REPORTING AN ITINERARY (MCL4)

Key Items: Account for all time, be specific.

To: ()

From: ()

Subject: Itinerary of (John Doe, August 21 to 28)

(I will be away from the office from August 21 to 28

August 21 - Leave LA at 8:15 a.m. by TWA to arrive St. Louis
at 2:30 p.m.

August 21 to 24 - St. Regis Hotel, St. Louis.
Checkout, 8 a.m., August 24.
Phone: (212) 444-5555

August 24 - Leave St. Louis at 10 a.m. by TWA for
Detroit arrival at noon.

August 24 to 28 - Book Cadillac Hotel, Detroit.
Checkout, 8 a.m., August 28.
Phone: (212) 444-5555

August 28 - Leave Detroit for LA by TWA 10 a.m.
arrival in LA at 11:15 a.m.

Return to office about 1 p.m., August 28.)

RESPONSE TO LETTER RECEIVED (MCL5)

Key Items: Acknowledge letter, promise prompt response.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(Mr. Johnson is on vacation in Europe until August 1. Because he is the only one who has the information you need, I will see that your letter of July 24 gets his immediate attention.)

In the meantime, please call on me if I can be of help.

Sincerely,

REFERRAL TO OTHER SOURCES--SALES (MCL6)

Key Items: Thanks for inquiry, introduce other source.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Thank you for writing about (ordering Como Water Heaters from us).

(As a manufacturer we distribute only through retail dealers. The dealer nearest you is Western Hardware, 4740 Arneill Road, Santa Barbara.)

(The dealer is able to provide installation and service should it ever be needed.) Thanks again.

Sincerely,

REFERRAL TO OTHER SOURCES--INFORMATION (MCL7)

Key Items: Thanks for inquiry, introduce other sources.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Thank you for inquiring about (gross figures for the savings and loan industry).

(Although we do have access to figures of our particular region, we do not maintain industry-wide figures. The League of Savings Institutions, 12 Water Tower Street, Chicago, Illinois, 62101, prepares comprehensive monthly industry-wide reports. These are available to the public, and you should write to them.)

Best wishes on success in your research.

Sincerely,

GOODWILL LETTER TO A RETIRING FRIEND OR ACQUAINTANCE (MCL8)

(date)

Dear ():

When I received the announcement that you were retiring from (dentistry and that your practice would be taken over by Dr. Brown), I felt a sense of great loss. But in retrospect, my thoughts turned to positives.

(Two emergency root canal operations on weekends saved me from much agony, and, I'm sure, from the loss of sound teeth. After 20 years of your superb dental care, I'm going to miss you, Dr. Smith.)

May the coming years bring you nothing but joy, good health, and the satisfaction from knowing that you have been a true (professional who cared about his patients).

Cordially,

CHANGE OF ADDRESS FORM (MCL9)

Key Items: Be specific, enclose address label, account number

(date)

(company)

(address)

(city, state, ZIP)

Subject: Change of Address

Please change the address on your records as follows:

Old address: (William A. Arthur
2724 Vitoria Lane
Apple Valley, California 91666)

to

New address: (William A. Arthur
561 Brighthurst, Apt 118
San Francisco, California 94118)

Attached to the bottom of this letter is an (address label or other correspondence) with my old address (and account number).

Thank you,

ANNOUNCING TERMINATIONS (MEM1)

Key Items: Announce impersonally, ask for support.

Date: ()

To: ()

From: ()

Subject: Employment termination of (Robert Justice)

The employment of (Robert Justice as assistant marketing manager), was terminated as of (June 30). (We hope to announce his replacement by July 15.)

In the meantime, I hope you will give (Susan Wolfe) your full support should (she) ask for your help during the next couple of weeks.

I appreciate your help and understanding during this period of change.

ANNOUNCING NEW STAFF APPOINTMENTS (MEM2)

Key Items: Announce, details, warm close.

Date: ()

To: ()

From: ()

Subject: (Assistant Marketing Department Head)

I'm pleased to announce the appointment of (Robert T. White) as (assistant head of the Marketing Department). (He) will fill the position vacated by (Marvin Broad), who recently (moved to the Northwest).

(Bob comes to us from Gynco Industries where he was in charge of all direct mail advertising. His duties with us will include direct mail, long-range planning, and liaison relationship with our ad agency, Smith and Moore. He has college degrees in art and business administration.)

I know you will give (him) our full cooperation and support. We wish (him) much success and a sincere welcome to our organization.

INTRODUCING NEW POLICIES OR PROCEDURES (MEM3)

Key Items: Clear organization, easy readability.

Date: ()

To: All Employees

From: ()

Subject: (New Interplant Bus Schedule)

Effective July 1, the following (schedule will apply to buses traveling between the Culver City and the Airport Plants):

(Departures from the main gates of each plant

8:00 a.m.	1:20 p.m.
8:20 a.m.	1:40 p.m.
8:40 a.m.	2:00 p.m.
9:00 a.m.	2:20 p.m.
9:20 a.m.	2:40 p.m.
9:40 a.m.	3:00 p.m.
10:00 a.m.	3:20 p.m.
10:20 a.m.	3:40 p.m.
10:40 a.m.	4:00 p.m.
11:00 a.m.	4:20 p.m.
11:20 a.m.	4:40 p.m.
11:40 a.m.	5:00 p.m.
12:00 noon	5:20 p.m.

Please post on all departmental bulletin boards.)

RECOMMENDATIONS FOR CHANGE (MEM4)

Key Items: Review situations, propose change, indicate action.

Date: ()

To: ()

From: ()

Subject: (Change in Working Hours)

I would like to suggest a change (in working hours to avoid congestion on neighboring streets and in our parking lots at peak rush hours).

(We have almost 1,000 employees coming to work and leaving work at the same time. About 600 automobiles are involved. As a result, it takes about 30 minutes for the last car to leave the parking area each evening. Additionally, many employees must get to work about a half hour early to park their cars and get to work on time.)

(I recommend the following:)

(Production and Plant Staff: The work hours of the production and plant staff be changed from 8 a.m. to 4:30 p.m. to 7:30 a.m. to 4:00 p.m. This change would affect about 600 employees, and it is a recommendation from the plant employee committee.)

(Office and Management Staff: Work hours for the office and management would remain as is--8 a.m. to 5 p.m.)

This change would mean that (about 300 cars would be arriving and leaving 30 minutes before the other 300 cars would be involved). If you would like to try this, (I'll be pleased to sample the production and plant people further about their willingness to change).

ANNOUNCING A MEETING--COMPANY COMMITTEE (MTG1)

Key Items: Time, day, place, special assignments or topics.

To:() Date:()

From:()

Subject: (name or type) Committee Meeting

A meeting of the (name or type) Committee

is scheduled for (time, day, date)

in (room, place).

Consideration will be given to (key agenda items).

Please notify (name and telephone number) by (date)

whether you will attend.

REMINDER ABOUT MEETING ROLE (MTG2)

Key Items: Explain, ask for action.

Date:()

To:()

From:()

Subject: Agenda of (Executive Committee) Meeting

(The agenda materials for the Executive Committee meeting on July 5th are complete except for your supporting items for your research funding request. Are they about ready?)

(I'll need the materials by noon on June 30th at the latest. Otherwise we wait until the next meeting.

Thanks for your help.

REQUESTING INFORMATION ABOUT MEETING FACILITIES (MTG3)

Key Items: Purpose, dates, facilities required.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Subject: Request for Information about Meeting Facilities

On (May 12, 13, and 14 of 1984), we will hold our (Board of Directors-Senior Officers retreat); and we are very much interested in the (Ojai Valley Inn).

Please send me information on room rates, food services, and recreational or entertainment facilities. The following information should be of help to you:

Rooms required: (34 double bedrooms for the nights of May 12 and 13 on American plan.)

Food services: (Dinner, May 12
Breakfast, lunch and dinner, May 13
Breakfast and lunch, May 14
All meals in a private dining room to accommodate 68 people.)

Number of people involved: (68 (husbands and wives))

Meeting rooms: (One meeting room to be available all day May 13 and 8 a.m. to noon, May 14)

Arrival and departure: (We plan to arrive between 3 and 6 p.m., May 12 and depart following lunch, May 14.)

Additional days: (Some guests may prefer to arrive earlier in the week and/or remain throughout the weekend. Please send information on these possibilities and costs.)

Recreation and entertainment: (Half of our group will not attend meetings but will participate in the available recreational or entertainment activities.)

When I receive this information and review it, I'll be in touch with you. May I hear from you by (November 1)?

Sincerely,

MEETING AGENDA (MTG4)

Key Items: Use names of reporters if possible. Delete unnecessary items.

AGENDA

(Meeting Title, Time, Place, Date)

1. Call to order
2. Roll call and determination of a quorum
3. Consideration and approval of previous minutes
4. Reading of correspondence
5. Office reports
6. Committee reports
 - a. Standing
 - b. Special
7. Old business
8. New business
9. Nominations, elections, appointments
10. Announcements
11. Adjournment

ANNOUNCING A MEETING--NON-COMPANY (MTG5)

Key Items: Time, day, place, special assignments or topics
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

The regular monthly meeting of the ()
Committee is scheduled for (Time, day, date)
at (room and location) .

Among the agenda items are () . Please let my office
know by (date) of your availability. I look
forward to seeing you.

Cordially,

NOTICE OF STOCKHOLDERS' MEETING (MTG6)

Key Items: Formal language, specific details.

Company Letterhead

Notice of Special Meeting of Stockholders

to be held on (April 14, 1984)

A special meeting of the stockholders of the (California and Company), a corporation in the state of (Delaware), has been called and will be held on (April 14, 1984 at 10:00 A.M.) at the registered office of the company, (4485 Wilshire Boulevard, Los Angeles, California). The meeting will be held for the following purposes:

1. (To vote on a proposed holding-company form of organization.)
2. (To consider such other business as may be presented.)

If you do not expect to attend, please fill in, date, sign, and promptly return the enclosed postage-paid proxy.

By order of the Board of Directors.

(_____
Secretary

(Los Angeles, California
March 1, 1984)

MEETINGS-PROXY FORM (MTG7)

Key Items: Check legal status of the form.

PROXY

I hereby constitute (_____),
(_____), and (_____),
(who are officers, or directors of the company), or a majority of
such of them as are present, to act for me in my stead and as my
proxy at the meeting of the stockholders of the California
Corporation on April 14, 1984 at the corporate office, and at any
adjournment or adjournments thereof, with full power and
authority to act for me in my behalf, with all powers that I the
undersigned would possess if I were personally present.

Effective date (_____)

Signed (_____) (_____)
stockholder city, state

ACKNOWLEDGING ORDER--CHANGE NEEDED (ORD1)

Key Items: Thanks, indicate problem, request change

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Thank you for your purchase order (#4415 of May 10) for (8 units of our Vaculight Tubes).

(Because we can ship only in lots of 12 units or more, may we change the order to 12 rather than 8. The units should move fairly rapidly, so 12 might be appropriate.)

May I have your approval of the change. Simply make a notation on this letter and return it in the enclosed envelope. Shipment can be made (promptly).

Cordially,

INQUIRING ABOUT QUANTITY DISCOUNTS (ORD2)

Key Items: Express interest, ask about discount, look forward

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

We are considering (providing each of our sales representatives with (pocket-size recording equipment to speed up communication with the home office). (A friend showed me his Lanier 40RD and I believe it would meet our needs).

Because we would purchase about (300 units), is a quantity discount available? I will appreciate your sending me this information as well as details about service and warranties.

I look forward to hearing from you.

Sincerely,

CONFIRMATION OF TELEPHONE ORDER (ORD3)

Key Items: Reconfirm details, close with forward look

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

This letter will confirm your telephone order of (September 9 for two Model 14, 36" x 48" walnut finish bookcases at \$84 each plus shipping charges of \$18 for a total of \$182). Shipment will be from (our factory in North Carolina) in about (three weeks), (C.O.D.)

We appreciate your order and look forward to being of service again.

Sincerely,

CONFIRMATION OF SHIPMENT (ORD4)

Key Items: Confirm, add details, seek more business

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(A dozen units of our Vaculight Tubes were shipped by United Parcel today).

(The yellow instruction tag attached to each unit explains how the replacement units should be installed, making the process simple. A display flyer is also included.)

(See the enclosed folder for other lighting products suitable for laboratory use.)

Cordially,

ROUTINE ORDER (ORD5)

Key Items: Use order language and careful detail

(date)

(company)
(address)
(city, state, ZIP)

Subject: Order for Materials

Please ship me the following items (listed in your current summer catalog):

24	#116 black film typewriter ribbon cartridges at \$2.50.....	\$60.00
100	#321 file dividers 8 1/2 x 13 at \$.30.....	30.00
12	#121 white film correction cartridges at \$1.80.....	21.60
		<u>21.60</u>
		\$111.60)

The enclosed check for (\$124.26 covers the cost plus delivery and sales tax). I shall appreciate receiving the materials by (June 20).

Sincerely,

ORDER WITH REQUEST FOR CREDIT (ORD6)

Key Items: Order first, request credit, close optimistically

(date)

(company)
(address)
(city, state, ZIP)

Subject: Order for Materials

Please send the following items (listed in your current summer catalog):

24	#116 black film typewriter ribbon cartridges at \$2.50.....	\$60.00
100	#321 file dividers 8 1/2 x 13 at \$.30.....	30.00
12	#121 white film correction cartridges at \$1.80.....	21.60
		<u>21.60</u>
		\$111.60)

(Deliver by parcel post to Zippo Printing, 1440 South Road, Merced, California.) The enclosed credit application, (filled out with the assistance of your salesman, Jack Smith,) should provide you with sufficient information to open a credit account for us.

(We are pleased with your product line and intend to continue carrying it.)

Sincerely,

ACKNOWLEDGING ORDER LETTERS (ROUTINE) (ORD7)

Key Items: Acknowledge and indicate shipping date

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear Customer:

Thank you for your order for (office supplies). You should receive them within (ten days).

Sincerely yours,

ACKNOWLEDGING INCOMPLETE ORDER (ORD8)

Key Items: Acknowledge, ask for missing information, look forward

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear Customer:

Thank you for your order for (office supplies). We are shipping the (typewriter ribbons) as your requested.

(You did not specify a color for the plastic file dividers which come in black, green, or yellow.) We are holding that item until we hear from you about the (color selection).

On receiving this information, we can get the (dividers) to you within (three working days). We look forward to serving you in every way possible.

Sincerely,

ACKNOWLEDGING ORDER WITH BACK ORDER ITEMS (ORD9)

Key Items: Acknowledge, ship partial order, indicate back order items

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear Customer:

(The file dividers and black film typewriter ribbon cartridges you ordered are being shipped today.)

(We are waiting for a shipment of correction cartridges from our manufacturer.) The shipment is scheduled for (this week), and we will forward this portion of your order just as soon as possible. You should receive it within (ten days).

We are sorry for the delay, but we assure you that everything possible is being done to make prompt delivery.

Sincerely yours,

REQUESTING QUANTITY DISCOUNTS (ORD10)

Key Items: Direct request, quantity involved, courteous close

(date)

(company)

(address)

(city, state, ZIP)

Subject: Quantity Discounts (on Model 12 Clock-Radio)

Please send me information about the cost and quantity discounts on your (Model 12 clock-radio).

(We are considering it as a gift for our five- and ten-year employees at our annual company dinner. About 100 employees are in these combined categories.)

I look forward to hearing from you.

Sincerely,

REPLYING TO INQUIRY--OFFER MORE THAN REQUESTED (ORD11)

Key Items: Indentify inquiry, indicate addition.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

(We'll be glad to send you the 50 reprints of "Managing by Objectives" by Marsh as you requested for your management conference. But you may be interested in a larger package.)

(Marsh has two other articles, "Management Challenges in the '80's" and "So You're a Manager" that compliment the article you requested. Fifty reprints of each of the three articles come as a package for \$25, only \$10 more than the cost of the reprints of the one article.)

(If you'd like all three, please let me know promptly. Otherwise, I'll send your original order on June 1.)

Sincerely,

ACCEPTING AN APPOINTMENT (CIVIC) (POS1)

Key Items: Accept first, show interest, close with thanks

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

I'm pleased to accept an appointment to the (Community Fine Arts Committee). (As you know, I have long been interested and active in bringing cultural activities to the community.)

Thanks for inviting me. I look forward to serving in every way possible.

Sincerely

ACCEPTING AN APPOINTMENT (BUSINESS) (POS2)

Key Items: Accept first, show interest, close with thanks

Date: ()

To: ()

From: ()

Subject: (Acceptance of Loan Committee Appointment)

I'm pleased to accept the appointment to the (Loan Committee). The appointment gives me an opportunity to (broaden my knowledge of our operations).

Thanks very much, and I assure you I'll do my best.

DECLINING AN APPOINTMENT (POS3)

Key Items: Explain before saying no, close gracefully.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

I am pleased to be invited to serve on the (Community Fine Arts Committee). Because of (a regular third-Wednesday board meeting of First Bank), I'll be unable to accept.

Best wishes, and thanks for thinking of me.

Sincerely

WRITING RECOMMENDATIONS FOR JOB APPLICANTS (REF1)

Key Items: Stick with factual, verifiable material.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(Sally Jones worked for me for three years--1977-1980--before leaving to start her family.)

(During the time she worked for me, Mrs. Jones had a perfect attendance record and displayed strong loyalty to the firm and dedication to her task.)

(She had two promotions during those three years, rising from staff auditor to audit manager. She did not hesitate to work extra hours to complete critical tasks.)

In total, we were very pleased by (her) performance and (her) dedication. I am happy to give (her) a strong endorsement.

Sincerely

REQUESTING INFORMATION ABOUT JOB APPLICANTS (REF2)

Key Items: Identify comments desired.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(Sally Jones) is being considered for a position (on our internal audit staff) and has given your name as a reference about (her) job competence. Will you please give us your candid opinion of (her) in terms of the following items:

1. (Her) skill in working as a member of a team.
2. (Her) ability to sense problem areas.
3. (Her) skill in problem solving.
4. (Her) potential to serve as a team leader.

Because time is a factor, may we have your comments by (April 25). We appreciate your help.

Sincerely,

REQUESTING RECOMMENDATIONS ABOUT PERSONAL QUALITIES (REF3)

Key Items: Specify comment areas.

(date)

(name)

(company)

(address)

(City, state, ZIP)

Dear ()::

(Sally Jones) is being considered for a (position on our internal audit staff) and has given your name as a reference. We have no questions about (her technical competence), but we would like you to comment on (her) personal qualities on these areas:

1. (Her) skill in interpersonal relations.
2. (Her) personal integrity.
3. (Her) dedication to her work.

(Ms. Jones) has given a waiver of (her) rights to review (her) job file. Because we must make a decision soon, may we have your response by (April 25)? Thank you very much for your help.

Sincerely,

WRITING SOCIAL RECOMMENDATIONS (REF4)

Key Items: Stick with factual, identify opinions.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

(As a member of the Mountain Country Club for over twenty years, I heartily endorse the nomination of William Charles for membership.)

(William (Bill) is well known in civic affairs, owns a home near the club, and is a respected business person. Although Bill is only a fair golfer, his amiability and integrity should make him a good member.)

(I will be pleased to represent him at his membership interview if desired.)

Sincerely,

WRITING A TO WHOM IT MAY CONCERN REFERENCE (REF5)

Key Items: Factual data with opinions identified.

(date)

(name)

(company)

(address)

(city, state, ZIP)

To Whom It May Concern:

(Lee Johnson served as an internal auditor on my staff from 1977 to 1981. He left ABC Company on June 1, 1981, to find employment in the Miami area and to care for two elderly parents.)

(Mr. Johnson is a true professional and effected many economies in our office and production facilities. He seems to identify problems clearly, to tackle them with skill, and to support recommendations with concrete evidence.)

(I my opinion, his work traits and loyalty are beyond question. Despite the sensitive nature of internal auditing, Mr. Johnson seemed to develop strong acceptance from employees on whose problems he worked.)

(I would be delighted to re-employ him should he return to our area.)

Sincerely,

COMMENDATION TO ANOTHER EMPLOYER (REF6)

Key Items: Identify purpose, fill in details.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(Mr. Albert Greene, financial analyst in your home office, gave a most interesting and informative speech today at the Breakfast Forum.)

(In a well organized and witty presentation, he made clear the difference between money market instruments and certificates of deposit accounts. The question-and-answer period revealed that his ideas were clearly understood and gave listeners a deeper understanding of some of the subtler differences.)

(I simply wanted you to know that he gave a professional talk-- one consistent with the image of your institution.)

Sincerely,

FOLLOW-UP REMINDER--ENCLOSURE MISSING (REM1)

Key Items: Don't accuse, specify item, request action.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

(I was pleased to get your letter reminding me of the special meeting at Stan Bates' home on the 18th.)

Unfortunately, the (map) that was to be enclosed was not included. Will you rush one to me right away. (I'm unfamiliar with the mountain area and the unmarked roads.) Thanks.

Cordially,

FOLLOW-UP REMINDER - GENERAL (REM2)

Key Items: Don't accuse, review details, request reply.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

(On May 24) I wrote requesting (information and a registration form from the 1984 national convention of ABEA in Detroit). (As yet, I have heard nothing.)

Will you please send (these materials) to me promptly. Thank you.

Sincerely,

REMINDER FOR REQUEST NOT ACKNOWLEDGED (REM3)

Key Items: Review facts impersonally, ask for action

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(On June 15, I received a letter saying the 50 reprints of "Management by Objectives" would be sent promptly. We wanted them for our management seminar on August 1, and the date is fast approaching.)

(The reprints are a vital part of the case analysis we have prepared for the seminar. Will you please let me know right away whether they have been sent?)

Sincerely,

REQUESTING A TRIAL OFFER (REQ1)

Key Items: Source and item, understanding of terms

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Please send me an examination (copy of "Managing by Theory Z" as advertised in the "Journal").

I understand that I may keep the (book) for (ten days) and return it without cost if I am not satisfied.

Sincerely,

REQUESTING INFORMATION ABOUT TRAINING MATERIALS (REQ2)

Key Items: Direct request, specific details

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Please send me information about your (training package called "Writing Better Letters").

(I recently went through a training seminar using the package, and I am now considering using it for our in-house development program. I'd like information about (a) quantity costs for the learning guide and (b) cost of the instructor kit that includes transparencies, audio tapes, and recommended solutions.)

I will appreciate a prompt response.

Sincerely,

REQUESTING TO REPRODUCE COPYRIGHTED MATERIAL (REQ3)

Key Items: Identify material and use to be made

(date)

(company)
(address)
(city, state, ZIP)

Subject: Request to Reproduce Material

May I have permission to reproduce the (article on Peter Drucker, "Communicating Effectively", published in your May 1983 issue of "Management").

I would like to reproduce (150) copies for (distribution at the annual meeting of the American Business Communication Association in New York on November 20-21).

(If reprints are available, I would be interested in your quantity prices. I appreciate your help and look forward to hearing from you.)

Sincerely yours,

REQUESTING PERMISSION TO QUOTE (REQ4)

Key Items: Identify source, use to be made, give credit

(date)

(company)

(address)

(city, state, ZIP)

Subject: Request to Quote

May I have permission to quote from (your publication "Managing by Objectives", by Frank V. Adams, Revised Edition, copyright 1982, in my forthcoming article "Planning for the '90's" to be published in the "Journal of Management").

I wish to use (twenty lines beginning on page 50 with "The goals of management are best served..." and ending on page 51 with "...to maintain our system of free enterprise.")

I will, of course, give full credit to the author, title, and publisher. If you have a preference for the permission documentation, please list it in the following space:

Thank you for your assistance. I will appreciate your returning a signed copy of this letter.

Sincerely,

Permission to use quoted material granted by:

_____ Date _____

GENERAL REQUEST OR INQUIRY (REQ5)

Key Items: Direct, specific, courteous, and brief. If to a company, omit salutation.

(date)

(company)
(address)
(city, state, ZIP)

Subject: Request for Information about (Model 14)

Please send me additional information about (your Model 14 outdoor barbeque). We are interested in (making quantity purchases). Thank you.

Sincerely,

REQUEST FOR FREE MATERIALS (REQ6)

Key Items: Direct, brief, appreciative. If to a company, omit salutation.

(date)

(company)
(address)
(city, state, ZIP)

Subject: Request for (1984 Annual Report)

Please send me a copy of (your 1984 Annual Report as offered in the April 15 issue of the "Wall Street Journal"). I appreciate this service.

Sincerely,

REQUEST FOR SPECIFIC INFORMATION (REQ7)

Key Items: Tabulate specific requests. If to a company, omit salutation.

(date)

(company)
(address)
(city, state, ZIP)

Subject: Request for Information about (Model 14)

I would appreciate your providing the following information about (your Model 14 outdoor barbeque):

1. Grill size and area.
2. Wholesale price and shipping lots.
3. Suggested retail price.
4. Promotional aids available to retailers.)

Thank you for your help.

Sincerely,

REQUESTING THE NAME OF A DEALER (REQ8)

Key Items: Direct, brief, explanation optional. If to a company, omit salutation.

(date)

(company)

(address)

(city, state, ZIP)

Subject: Request for Name of Dealer

Please send me the name and location of a dealer (near Boise) who carries your (word processors).

(We would like a hands-on introduction to the equipment.)

Sincerely,

REQUEST FOR ADDITIONAL STAFF (REQ9)

Key Items: Request first, support with details

Date:

To:

From:

Subject: Request for Additional (Teller)

I request the addition of (one teller-clerk in the Anaheim office) for the following supporting reasons:

1. (During the past seven months--January through July--the number of accounts in the Anaheim branch has increased from 4,566 to 6,740.)
2. (The number of daily transactions has increased from 427 to 615. As a result, inordinately long lines of customers at the teller windows occur between 9 a.m. and 10 a.m.; during the noon hours; and the hour before closing, 4 p.m. to 5 p.m.)
3. (The three tellers presently on duty experience frustration with the idea of having customers complain about the long waits. On many occasions, I have to leave my desk to fill in at the teller windows. All of us find it difficult to prepare our reconciliations during normal working hours.)
4. (In the event of illness of one teller, we would have considerable trouble in satisfying our customers.)

(I would appreciate having an experienced teller transfer to our branch; but if this is not possible, I will accept someone coming from the training program.) I will appreciate approval of this request.

DECLINING A REQUEST WITH AN ALTERNATIVE (REQ10)

Key Items: Acknowledge request, explain, decline, alternative
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

(I can certainly meet with you to discuss your survey for your master's thesis. Would 1:30 p.m. on Wednesday, August 18 be satisfactory?)

(I have asked my secretary to let you go through our suggestion program files after I leave for my meeting at 2 p.m. In lieu of having you make copies of the suggestions, I believe having the files available will provide dividends.)

(Please phone my office at 776-4848 if the meeting on August 18 is all right.)

Sincerely,

REPLYING TO A REQUEST FOR DONATION--ACCEPTANCE (REQ11)

Key Items: Accept, indicate the amount, close optimistically
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

I'm pleased to enclose a check for (\$1000 for membership in the President's Circle organization).

I congratulate you on the professional way in which the solicitation was conducted, and I look forward to the (annual dinner get-together of members).

Sincerely,

REPLYING TO A REQUEST FOR DONATIONS--REFUSAL (REQ12)

Key Items: Acknowledge the request, explain, refuse.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Thank you for writing about the (special year-end fund drive for the University).

(The Foundation makes an annual contribution of \$100,000 to the medical school of the University, and this is our maximum contribution to any institution.)

Please accept my good wishes for the success of (your campaign). I know how important the endeavor is.

Sincerely,

REQUESTING A REFUND FOR MERCHANDISE RETURNED (REQ13)

Key Items: Request refund, review details, specify action

(date)

(company)
(address)
(city, state, ZIP)

Subject: Request for Refund

I am returning for a refund the (four bonus books which you sent on my payment of membership dues in the Book Club). I paid (\$12 by personal check #325 on May 1).

(According to the terms of the membership offer, I may return the books within ten days for a full refund if not fully satisfied. I am not satisfied, and I am acting within the ten-day period.)

Please make the check out to me and send it to my home address: (3478 Kensington Lane, Ontario OR 93041). Thank you.

Sincerely,

REQUESTING AN INTRODUCTION (REQ14)

Key Items: Explain who and why, express gratitude.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

(Our new syndication is nearly completed, and we are ready to roll with two northern California projects. As newcomers to the area, though, we would like to cement relations with several of the financial institutions.)

Would it be possible for you to write a brief letter of introduction for me and send it to (your former colleague, Robert Edwards)? I understand (he) is a difficult person to get to see, and I think it would be a good idea if a letter got to (him) before I called.

I hate to impose, (Jim), but you are the one person I know who can help in this case. I'd certainly appreciate your doing this. Best wishes as always.

Sincerely,

REQUESTING CHANGE OF DELIVERY DATE (REQ15)

Key Items: Give specific details, be optimistic.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

(Would it be possible to receive our draperies by June 10 rather than on June 17 as we originally ordered? Our purchase order is #3445-1 and is dated May 1. Your confirmation order is #A-7678.)

(To beat some competitors to the punch, we plan to move our grand opening ahead one week; and, of course, the draperies are a vital part of our decorating.)

(If they can be shipped by overnight air express, we'll be happy to pick up the extra charges.) I'd appreciate your phoning me at (805-988-3322) to confirm these arrangements.

Thanks very much.

Sincerely,

DECLINING REQUEST-INFORMATION NOT AVAILABLE (REQ16)

Key Items: Thanks, explain, close cordially.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Thank you very much for (inviting us to participate in your research project by submitting copies of our correspondence for review and analysis.)

(As a law firm, we have a most confidential relationship with our clients. And even though we might 'lock out the inside address and close, the body of the letters may still contain information of a confidential nature including names and places.)

Although we must decline your (invitation), we wish you success with your (project). We hope you will keep us on your list to receive (a summary of your final report).

Sincerely,

CANCELLING RESERVATIONS--NO ADVANCE PAYMENT (RES1)

Key Items: Details, then cancel.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Subject: Cancellation of Reservation

(On Aprli 12, I reserved a car for one week, May 1-7.)

Please cancel the reservation. Thank you.

Sincerely,

CANCELLING RESERVATIONS--ADVANCE PAYMENT (RES2)

Key Items: Details, cancel, ask for confirmation.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Subject: Cancellation of reservation

I recently made a reservation (at your hotel for the nights of August 21, 22, and 23). Please cancel it immediately.

The advance reservation deposit was (charged to my Visa card, 444-4848-6132). (If you have processed the charge, please cancel it.) (I will appreciate a confirmation of this cancellation.) I'm sorry for the inconvenience.

Sincerely,

MAKING HOTEL RESERVATIONS (RES3)

Key Items: Specific details, ask for confirmation, omit salutation.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Subject: Reservation Request

Please reserve a room with (queen-size bed) for me (and my wife) for the (nights of Wednesday and Thursday, June 17 and 18). (We will arrive about (3 p.m. on June 17) and depart by (noon on June 19)).

I will appreciate a prompt confirmation.

Sincerely,

REPORTS--CONTENTS PAGE (RPT1)

Key Items: Include all headings in the report.

Contents

(I. Introduction	1
Purpose of the study	1
Method and sources of data	1
II. The Stereo User	3
Youth Dominates the Market	4
Likely Prospects: White-collar Males	5
III. Purchasing Preferences	6
Quality and Power	7
Speakers and Amplifiers are Desired Components	8
Moderate Price Range Desired	10
IV. Conclusions and Recommendations	11
V. Appendix)	

REPORTS--SUMMARY OR SYNOPSIS (RPT2)

Key Items: Condense highlights of a long report.

SUMMARY

(On March 1, Mr. Charles Smith, Vice President of Marketing, authorized a study to determine the (a) characteristics of our retail customers, (b) types of stereo components desired, and (c) range of dollars to be expended on future purchases.

A questionnaire study included over 7,000 visitors to ten stores selling stereo components in the Kansas City area. In all, 2350 owned stereo systems and were contemplating future purchases. These 2350 completed questionnaires.

Some highlights of the findings are

- Over half were in the 25-to-35 year age group, were white collar workers or skilled laborers, and had incomes of \$25,000 or more.
- Three out of four were males.
- Tape components were the most desired additions.
- Components contributing to increased power and to noise reduction were also strongly desired.
- An average of about \$250 was estimated to be spent by each on additions to current systems.

Based on these and other findings presented in the report, advertising should be focused on a young, relatively affluent male. Emphasis should be placed on tape components and on those components contributing to improved power and tone.)

REPORTS--TITLE PAGE FOR FORMAL REPORT (RPT3)

Key Items: Title, prepared for, author, date

A FORMS CONTROL PROGRAM

prepared for

Harold J. Bermuda

Ajax Corporation

by

Maxine J. Johnson

June 18, 1984

SELLING A SUBSTITUTE (SEL1)

Key Items: Thanks, review the situation, introduce substitute

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Many thanks for your order for (24 stitch-bound ledger books).
(They have long been a popular item.)

(With the changes occurring in many office procedures, we have found that the permanent paging of the stitch-bound ledgers has limited the flexibility in their use. In many cases, customers told us that we either had too many or too few pages in the books.)

(Therefore, we have developed a loose-leaf ledger set in which the number of pages included is a user's choice. You simply order a supply of paper and as many loose-leaf binders as you may need. The cost of 24 loose-leaf binder and 2,000 sheets of ledger paper, with reinforced binder holes, is about the same as the stitch-bound ledgers, \$138.69 tax and delivery included.)

(Because the loose-leaf set is a new item, and not in our current catalog, I thought you might be interested in the flexibility it provides. Please phone me collect after you have a chance to study the enclosed descriptive brochure.)

Sincerely,

SALES--ACTIVATING OLD ACCOUNTS (SEL2)

Key Items: Stress desire to serve, avoid negatives

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

We've missed you at (Buffums).

Our records show you haven't (used your preferred customer charge card in over six months). I hope nothing serious has prevented your (shopping at Buffums.)

On the other hand, if we have not pleased you in some way, please let me know. Our greatest desire is to provide you with the finest quality (merchandise) at consistently low prices.

Please drop me a note if you'd like. Better yet, come in and let's review our good relationship. (We do miss you at Buffums, and we won't let you down.)

Sincerely,

SALES-REQUESTING PROJECT VOLUNTEERS (SEL3)

Key Items: Get attention, explain, ask for action

(date)

(company)
(address)
(city, state, ZIP)

Dear Friends:

(The residents of Retirement Homes in Mayport are very much interested in learning more about your organization and about how they collectively and individually may participate in your activities.)

(To accomplish this goal, we have scheduled a Community Service Volunteer Fair for the afternoon of Friday, October 21, from 2 to 6 p.m.)

(You are invited to send one or more representatives to staff an information booth during those hours. Please bring whatever informational material you have available for distribution.)

(The plan is to have interested residents visit various booths to acquaint themselves with a number of community organizations. Many of us are a little shy about volunteering, and we are certain the face-to-face contact the Fair will provide will encourage many to seek an opportunity to use their creative talents, backgrounds, and energy in building a better community.)

(If you would like to participate, please let us know by returning the enclosed application. We will provide the tables, chairs, and other physical equipment necessary. May we expect you?)

Sincerely,

SELLING THE SERVICES OF A NEW BUSINESS (SEL4)

Key Items: Attention, Interest, Desire, Action

(date)

(company)

(address)

(city, street, ZIP)

Dear Friend:

("Boulder City doesn't have a good restaurant!")

(But it does now! When we heard that statement two years ago, we were determined to do something about it and began plans for the sparkling new Mariana's Bit of Italy.)

(Chef Luigi Capelli, formerly of Roma Villa in Las Vegas, joined us as Director of Food Preparation. That's enough to bring in customers who know good food. But we have more...courteous staff, luxurious surroundings, good wine, and generous bar service.)

(Once you've been here, you'll return again and again. A variety of hearty pasta dinners including salad or soup and spumoni ice begin at \$3.95. That's a treat! We'll become famous for our veal entrees. Chef Capelli's variety of famous sauces compliment veal as no other can. And prices begin at only \$6.95.)

(During our grand opening - August 1 to 10 - a complimentary half liter of wine accompanies each meal. Reservations are recommended. Simply phone 670-1111 to arrange a visit to "Boulder City's really good restaurant.")

Cordially,

SELLING TO OBTAIN CONTRIBUTIONS (SEL5)

Key Items: Attention, Interest, Desire, Action

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(Camarillo City is proud of you!)

(Last year over 3,500 young boys and girls participated in recreation and learning activities at the new Boys and Girls Club, which you made possible through your generosity. These youngsters made a total of about 500,000 separate visits to the Club.)

(You should be proud of yourself, too, for these half million visits provided constructive outlets for youthful energies that might otherwise have been spent in ways we don't like to think about.)

(But now the Club is bulging at the seams. The long awaited Phase II construction is on schedule. The only problem is that we are \$76,000 short of the needed construction money.)

(So we have come back to you and the other faithful citizens who helped get the Club off the ground. Please stop by, review the plans that will enable us to serve more young people, and consider your role in continuing to build a better community.)

(Your gift of \$100 to \$500 will get your name on the sponsors' plaque and is, of course, tax deductible. Gifts of any amount are welcome, too; and donors receive a Sustaining Member certificate suitable for framing. We very much need your help.)

Most sincerely,

SELLING TO GET AN ORDER BY MAIL--PRIDE APPEAL (SEL6)

Key Items: Attention, Interest, Desire, Action, Low Price

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

(You May Not...)

(have an income of \$60,000 a year, belong to country club, own two cars, wear Brooks Brothers suits and \$100 shoes.)

(Not many people fit this pattern, but this is the profile of the typical subscriber to "Fortune". We can't say that reading "Fortune" creates this kind of wealth. But we do believe in statistical relationships, so perhaps people who reach this level find "Fortune" the magazine that meets their needs.)

(With up-to-the-minute articles about the political scene, economics, business and industry profiles, and business people, "Fortune" brings you just what you need to keep abreast. You'll also benefit by reading both sides of current issues. "Fortune" pulls no punches!)

(Twenty-four issues--two each month--will be delivered to your home or office for only \$23.95. That's well under half the newsstand cost! Along with your subscription, we offer "Fortune's" executive planning book FREE.)

(All you have to do to join our family of influential, prosperous readers is return the enclosed order form. We'll charge it to your credit card or bill you later. Subscribing to "Fortune" may be one of the best things you have done.)

Sincerely,

SELLING AN INTANGIBLE--COLD CANVASS (SEL7)

Key Items: Attention, Interest, Desire, Action

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(A Mortgage
Is A Wonderful Thing)

(Unless you have no means to pay it off if necessary. Do you have a mortgage? It means you can live comfortably, build an equity in real estate, and help achieve financial security.)

(Right now, you are on your way to achieving these things. But mortgages represent debts that must be paid. What would happen if you were suddenly taken away, and your family had to assume the burden?)

(One answer is a simple plan of life insurance that pays off the mortgage in the event of such a happening. It means your family will have the home just as you planned it. It will provide the same comfortable home, the same equity, and the same step toward financial security. You can assure these things for the equivalent of less than 1% of your mortgage annually.)

(May your representative, whose card is enclosed, give you a call in a few days to provide you with the information that applies to you personally?)

Sincerely,

SALES - FOLLOWING-UP PRESENTATION WITH AFTERTHOUGHT (SEL8)

Key Items: Thanks, add a point, look forward.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Thank you for the opportunity to make my sales presentation to you on (October 15).

(Incidentally, just today a decision was made to increase our total national television and magazine advertising by forty percent.)

Many thanks for your courtesy. I look forward to meeting with you again.

Sincerely,

SALES - THANKS FOR ALLOWING A SALES PRESENTATION (SEL9)

Key Items: Extend thanks, recall courtesy, give a push

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

I appreciate very much the opportunity you gave me to present my sales message on (October 15).

The discussion was helpful to me and hopefully to you also.

Please call on me whenever I can be of any help. I look forward to hearing from you.

Cordially,

SALES - HOLIDAY MESSAGE: THANKSGIVING (SEL10)

Key Items: Mention holiday, thanks for business, cordial close
(date)

(company)
(address)
(city, state, ZIP)

Dear ():

At (Thanksgiving) time we pause to give thanks for many things--
for family, for health, for our freedoms.

But it is also a time when we think of those who have meant so
much to us. We thank you for being such a good customer, and we
want to continue to merit your confidence.

Please accept our very best wishes for a pleasant holiday.

Sincerely,

SALES - HOLIDAY MESSAGE - CHRISTMAS (SEL11)

Key Items: Mention holiday and its meaning, extend thanks
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Christmas is a time for gifts and warm thoughts.

Your gift to us is a year long one--the opportunity you have
given us to serve you. Our warm thoughts to you are in sincere
appreciation for being someone we enjoy working with.

May this season bring you every joy and the new year bring you
health and happiness.

Cordially,

SALES -HOLIDAY MESSAGE - JULY 4 (SEL12)

Key Items: Mention holiday, interpret meaning, close cordially
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

As Independence Day nears, we reflect on the foresight of our founders who established a nation conducive to individual freedom and private enterprise.

But we also reflect on the part others have played in making our tasks easier. Your efforts in promoting our products in your community aren't unnoticed. You are very important to us, and we deeply appreciate being able to work with you.

Let us know whenever we may be of help.

Sincerely,

SALES - INTRODUCING A NEW SALESPERSON (SEL13)

Key Items: Introduce, give background, explain, look forward
(date)

(name)
(company)
(city, state, ZIP)

Dear ():

(Mr. Gordon W. Smith) has been appointed (sales representative) to manage accounts in your area.

(Gordon) comes to us from (General Electric) where (he) acquired much depth and valuable experience.

(He) is a person of high standards and sound character, and I believe (his) experience and knowledge will be most helpful to (his) customers. I'm confident that you'll like (him).

Sincerely,

SALES - ANNOUNCING A RETIREE AND REPLACEMENT (SEL14)

Key Items: Announce retirement, introduce replacement

(date)

(name)

(company)

(address)

(city, state ,ZIP)

Dear ():

On (January 1, John Williams) retires after more than (40) years of service with us. Because you are one of (his) good customers, I'm sure you'll join us in wishing (him) the very best in (his) "new" career.

At the same time, (Fred Finley) will assume (John's) responsibilities. (Fred) has been with us for some time and is a person in whom we have great hopes for the future.

(He) is looking forward to meeting you. I'm confident you'll like (him).

Sincerely,

-> SALES - PROMISING SERVICE FOLLOWING SALE (SEL15)

Key Items: Thanks, promise service, look forward

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

You "made my day" yesterday when you placed that big order.

I want you to know that my interest in you and our products doesn't stop with the sale. I'll make it a point to handle any problems you might have quickly and with care.

Please let me know whenever I can be of service. I want our relationship to be mutually beneficial. Thanks once again.

Cordially,

SALES - THANKS TO A NEW CUSTOMER FROM EXECUTIVE (SEL16)

Key Items: Thanks, offer service, welcome to the family
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

When I learned of your order today, I was extremely pleased-- pleased not only because of the business, but because of your confidence in us.

As (Sales Vice President), I try to keep in touch with our accounts on a regular basis. I'll keep you informed of new developments, changing price structures, and promotional plans.

I'm pleased to welcome you to the (Delta Point) family. Thanks sincerely for giving us the opportunity to serve you.

Cordially,

SALES - THANKS FOR AN ORDER FROM AN OLD CUSTOMER (SEL17)

Key Items: Unusual thanks, review relationship, look forward
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Thanks, thanks, thanks. All too often, we tend to look on repeat orders as routine.

But when good customers like you reorder, I simply have to say thanks more than once. Through the years, you have meant a lot to us.

We very much appreciate our (good) relationship, and we look forward to continuing to serve you in the best way we know-- promptly, courteously, and efficiently.

Sincerely,

SALES - MESSAGE FOLLOWING-UP A "NO BUY" (SEL18)

Key Items: Thanks, stress benefits, close with forward look

(date)

(name)

(company)

(address)

(City, state, ZIP)

Dear ():

I appreciated the opportunity to discuss our line with you yesterday.

As I mentally reviewed the reasons why the "no-buy" decision was made, I realized that my presentation didn't cover all the bases. I'm working on some plans that grew out of our meeting. That was the valuable part of our meeting.

When I have a package that will meet your needs, I'll call for an appointment. Thanks once again.

Cordially,

SALES - FOLLOW-UP WHEN PRICE IS AN OBJECTION (SEL19)

Key Items: Thanks, review objection, talk about small amounts

(date)

(name)

(company)

(address)

(City, state, ZIP)

Dear ():

I appreciated the discussion we had yesterday about (installing the heater-air conditioner unit in your home).

Although I sensed that you were on the verge of ordering the (unit), you decided against it because of the (\$2100) cost. Let me try to put the cost in proper perspective.

(Just in terms of the five-year warranty period, the unit would cost just \$1.15 a day. And of course, it will last much longer than that. You already know of the potential savings in energy costs, the added comfort of air conditioning, and the absence of dirt the unit provides.)

I'd like you to kick around the idea that all this is certainly worth much more than \$1.15. In fact, the unit will pay for itself over time.)

I'll call you next week.

Sincerely,

SALES - FOLLOW-UP COUNTER PROPOSAL (SEL20)

Key Items: Thanks, make proposal, ask for order

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Many thanks for spending time with me last week.

I know you were concerned about investing in such a large order at one time and about how rapidly the inventory would move, so I've an offer to make.

Order the total initial amount, and we'll ship you (one-third) of it on the (first day) of each of the next (three months). We'll also bill you (monthly) for the units shipped that (month). If you find the units moving rapidly, you can give me a call. We'll readjust the schedule to meet your increased needs.

The bottom line is profit; without units on hand, no sales, no profit. I'll call you at the beginning of next week if you don't call me first.

Sincerely,

SALES - ANNOUNCING A FREE PROGRAM - INVESTMENTS (SEL21)

Key Items: Get attention, build interest, invite

(date)

(name)

(company)

(address)

(city, state, ZIP)

It's not how much you earn, but how much you keep!

(Personal tax management) is something we all pretend to perform, but it's something we all can learn more about.

On (February 10th at 7 p.m. in our offices, a panel of three estate and tax planners will discuss investment analysis, tax avoidance strategies, and estate planning).

You are cordially invited. Admission is free. Simply return the enclosed (card).

You have nothing to lose and a lot to gain!

SALES - MESSAGE TO NEW RESIDENTS (SEL22)

Key Items: Welcome, describe services, invite

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Welcome to our community!

You are probably familiar with many of the banks, stores, and other every day businesses. But I want to tell you something about our services.

(As members of all stock exchanges, we provide you with a full range of investment services. Whether it is stocks, bonds, mutual funds, money market accounts, or tax-exempt investments, we offer you competent assistance in planning your financial programs.)

I will phone you in a few days. In the meantime, however, if you like, please drop by our offices just to get acquainted...(afternoons) are best. We'd love to see you.

Sincerely,

SALES - INVITATION TO A TRADE SHOW BOOTH (SEL23)

Key Items: Invite, describe services, look forward

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Here's an opportunity to visit my competitors as my guest!

The enclosed tickets will admit you to the (Electronics Fair) and (Trade Show any day, October 10-14).

Almost every (manufacturer of office equipment) will have displays. After you've visited some, stop by booth (27) and see a really different product line.

I'll look for you.

Sincerely,

SALES - LETTER TO PREVIOUS CONTACTS (INTERVIEW REQUEST) (SEL24)

Key Items: Remind of association, arouse curiosity, follow up

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Since we last chatted, I've been involved with some exciting developments in our (software packages).

I'd like to share with you the application of some of these because they are directly related to your operation. They can be of great value.

I'll phone early next week to arrange a time when we can meet at your convenience.

Cordially,

SALES - THANKS FOR CONTRACT RENEWAL (SEL25)

Key Items: Thanks, reveal appreciation, closer cordially

(date)

(name)
(company)
(address)
(city, state ,ZIP)

Dear ():

My sincere thanks to you and your (Board) for renewing the contract.

Although it seems to be routine, I get a special feeling of gratitude with each renewal.

You are something special!

Cordially,

SALES - PRAISING A SALESPERSON FROM A MANAGER (SEL26)

Key Items: Congratulate, praise, look forward

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

You are the epitome of a (salesman)! Congratulations on your big (third-quarter sales).

I'm very pleased for you, (Bob), and I look forward to your continuing to set examples for our (staff). My best wishes as always.

Cordially,

SALES - INVITATION TO SHOWROOM DISPLAY (SEL27)

Key Items: Arouse curiosity, invite, look forward

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

On (January 10) we are unveiling a work of art--the new "(Computer Images)".

Please stop in.

Cordially,

SALES - THANKING CUSTOMER FOR A REFERRAL (SEL28)

Key Items: State what happened, offer thanks

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(Mr. and Mrs. Richard Dickerson) are enjoying their new (home decor). They are delightful people.

My sincere thanks for bringing us together.

Cordially,

SALES - THANKING CLIENT FOR A REFERRAL (SEL29)

Key Items: State what happened, offer thanks

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(Mr. and Mrs. Frank Kowalski have a new estate plan.)

(They) and I thank you.

Cordially,

SALES - SEEKING REFERRALS FROM CUSTOMERS (SEL30)

Key Items: Recall satisfaction, ask for referrals, close cordially.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

As I left your (home) yesterday, I felt great pride in the job you and I had done with your (interior decorating).

Your comment that "(it feels and looks like a sparkling, new home)" got me to thinking that would be a great sales slogan. Now I would appreciate a favor from you. Will you keep the enclosed (post cards) handy to send me the names of friends who might be interested in my (services)?

I'm sure your (visitors) will ooh and ah over your (decor). Some will indicate interest in (doing the same thing). I'd like to know them.

I hope you continue to enjoy your (surroundings), and I stand ready to assist you in any way possible.

Cordially,

SALES - SEEKING REFERALS FROM CLIENTS (SEL31)

Key Items: Recall satisfaction, ask for referrals, close cordially.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

I'm pleased that you're pleased!

Many thanks for your nice (note) about the (financial plan that was designed for you). I hope you'll not think of this request as an imposition but as an offer to assist and please others.

Will you jot down on the enclosed the names of (two or three) people who you think might benefit from (similar planning)? If you'd prefer that I not use your name in contacting them, indicate that, too.

Almost all our new (clients) are referred to us by current (clients), so I'd be grateful for your help. Pleasing people through (sound planning) is our business.

Thanks once again.

Cordially,

WELCOMING A NEW DEALER (SEL32)

Key Items: Welcome, talk family, look forward.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Whenever a new dealer is added to our family at (Hunts Foods), I not only take pride, but I also try to express the appreciation of those of us who are sort of locked up at the home office.

We want to serve you in every way possible, (Mr. Jones); and I hope you'll let me know personally whenever your service is either bad or good.

In the meantime, we are happy to welcome you to the (Hunt) family; and we look forward to many years of a mutual rewarding relationship.

Cordially,

ACCEPTING A MEMBERSHIP INVITATION (SOC1)

Key Items: Accept, look forward.

(date)

(name)

(address)

(city, state, ZIP)

Dear ():

I accept with pleasure, as well as with a sense of pride, your invitation to become a (charter member of Delta Pi Epsilon at the University of Detroit).

(It will be good to renew old friendships.)

Cordially,

SENDING CONDOLENCE OR SYMPATHY (SOC2)

Key Items: Open with sympathy, show interest and comfort.

(date)

(name)

(address)

(city, state, ZIP)

Dear ()::

I was deeply sorry to hear of your sad news. (Jim) was a fine (man) with whom I spent many enjoyable and constructive times. (He) will be greatly missed by all of us who knew (him) and who worked with (him) in (building a better community). Please accept my deepest sympathy.

Most sincerely,

CONGRATULATIONS ON AN ENGAGEMENT (SOC3)

Key Items: Warm and enthusiastic tone.

(date)

(name)

(address)

(city, state, ZIP)

Dear ()::

Your good news just arrived, and I wish you and (Carl) every possible happiness. (He) has always seemed to me like a wonderful person, and now I know (he) is a lucky one as well.

Please congratulate (him) for me.

Very sincerely,

REPLYING TO CONGRATULATIONS (SOC4)

Key Items: Extend appreciation, add personal detail.

(date)

(name)

(address)

(city, state, ZIP)

Dear ()::

Many thanks for your nice words about (my appointment to the President's Trade Council). Of course I'm pleased as punch about it.

More importantly, I'm really pleased that you would take the time to write. Thanks again.

Cordially,

CONGRATULATORY LETTER (SOC5)

Key Items: Acknowledging achievements builds good will.

(date)

(name)

(address)

(city, state, ZIP)

Dear ():

I just learned of your (appointment to the President's Trade Council). (This is genuinely a post of distinction and certainly well deserved.)

Please accept my best wishes for every success, (Bob).

Cordially,

SYMPATHY TO AN ILL COLLEAGUE (SOC6)

Key Items: Show distress, look forward.

(date)

(name)

(address)

(city, state, ZIP)

Dear ():

(I was shocked to learn of your operation; but now that you are on the road to full recovery, we can think about better things.)

(You are sorely missed by all of us in the office, Walt, more so for the brightness your daily jokes brought than for the work you left us to pick up. Maybe we should save a pile of it for your return.)

(I know the by-pass is becoming routine...but try to tell that to the patients, right! Take care of yourself, recover fast, and we'll look for your smiling face around here in a short time. If you can think of anything I can do, have Margie let me know.)

Most sincerely,

CONGRATULATING A COLLEAGUE ON A PROMOTION (SOC7)

Key Items: Congratulate but keep it light.

Date: ()

To: ()

From: ()

Subject: (Promotion)

Someone said that it couldn't be done...but you did it!
Congratulations on the move upstairs!

We'll miss you down here in the pits, but you know we're all for
you and will do everything possible to help when you call on us.

I'm happy for you and proud, too.

Sincerely,

RECOMMENDING ANOTHER PERSON FOR MEMBERSHIP (SOC8)

Key Items: Review background, recommend membership.

(date)

(name)

(address)

(city, state, ZIP)

Dear ():

(Professor Charles Einhart of the accounting faculty at Oregon
State University has served three years on the Alpha Kappa
Foundation committee to select a Foundation award winner for the
outstanding contribution to the literature of accounting. This
past year he served as chairman of the committee.)

(Charles has served all this time even though he is not a member
of Alpha Kappa. I know he'd be flattered by an invitation to be
initiated as a faculty member of the Fraternity. I know he'd
also very much like to be a member.)

(Although I don't know what your chapter's policies are about
initiating faculty members, I hope you'll mention Dr. Einhart to
the officers this fall.)

Sincerely,

THANK YOU FOR BIRTHDAY WISHES (SOC9)

Key Items: Thanks, add detail, keep it light.

(date)

(name)

(address)

(city, state, ZIP)

Dear ():

Who's counting?

I am, and I'm counting you among my best friends for the thoughtful good wishes on my birthday.

One of the comforting things about getting a year older is the knowledge that all your friends experience the same thing. Thanks again, old friend.

Sincerely,

SENDING BIRTHDAY WISHES (SOC10)

Key Items: Happy Birthday, keep it light

(date)

Dear ():

Old Father Time just keeps rolling along. According to my calendar, he has added another year to your record. (Life does begin at forty, Jay, and) I wish you all the best on (November 2) and on all the days that follow.

Best regards,

REQUESTING A SPEAKER--NO HONORARIUM (SPK1)

Key Items: Persuasive tone, minimize no honorarium.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(The biannual convention of Psi Kappa Psi, national professional business fraternity, will be held in Chicago, August 23-27. The 400 college men and women attending are majoring in all areas of business, and they are very much concerned about the job-seeking process.)

(You would be the ideal person to be the speaker at our awards luncheon on August 26 at noon and to describe the do-and-don't aspects of applying for a job. I heard you present this topic at the Career Day Fair at Western University recently.)

(Although the fraternity does not provide honorariums, it can assure you of an enthusiastic and appreciative audience. You can also provide a service for these young people.)

I look forward to hearing from you (Dr. Brown) and will send you additional details at that time. We'd be most grateful for your contribution.

Sincerely yours,

ACKNOWLEDGING SPEAKER'S HONORARIUM (SPK2)

Key Items: Thanks, good audience, close with forward look.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Thanks very much for the check and for the nice words about my presentation at your (conference in San Diego).

Whatever success I had was due to the receptive and gracious audience. They were a pleasure to work with.

I hope you'll consider me for future programs. I still have more to say.

Cordially,

ACCEPTING A SPEAKING ASSIGNMENT (SPK3)

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

I'm pleased to accept your invitation to speak at your (annual awards dinner at the Hilton on December 12).

My topic will be ("Your Slip is Showing," a talk about errors in communication and how to avoid them). (As you indicated, I'll need about 35 minutes; and we will not have a question-and-answer period. A photo and brief biographical sketch are enclosed.)

I'll look forward to seeing you about (6:30 p.m. on the 12th.)

Sincerely,

CONFIRMATION OF SPEAKER ARRANGEMENTS (SPK4)

Key Points: Happy tone, specific details; and with offer to help.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Date ()::

I was absolutely delighted to receive your acceptance to our invitation to have you (keynote the annual management conference).

Your presentation is scheduled for (the 10-11 a.m. period on September 14 in the Valencia Room at the Marsh Hotel and Country Club in Scottsdale). (Your topic "The Japanese Theory Z" is ideal for our group. You may talk for the full hour, or on the other hand, if you may save about 15 minutes for a question-and-answer session, we'd like that,too.)

(A room has been reserved for you for the nights of September 13 and 14. A hotel courtesy car provides airport-to-hotel transportation every 30 minutes.)

(You are invited, of course, to join us in all our activities during your stay. If I can be of further help, please let me know. I look forward to seeing you.)

Cordially,

TRANSMITTING PAYMENT TO AN EXCELLENT SPEAKER (SPK5)

Key Items: Enclose payment, be complimentary, close graciously.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

Here is a check for (\$877) which covers your honorarium of (\$500) and expenses of (\$377).

(Dr. Smith), you provided us with the most (informative) and (entertaining) talk we have had in the (15 years) I have been attending the (ARA conventions).

If you need any recommendations, anyone at the convention will give you the highest rating. I hope our paths cross again soon.

Cordially,

REQUESTING A SPEAKER--HONORARIUM AVAILABLE (SPK6)

Key Items: Persuasive tone, complete detail.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

You have been highly recommended by (Arnold Smith, President of the American Trucking Association), as keynote speaker for the (annual meeting) of the (Society of Real Estate Appraisers). This meeting will be at the (Sheraton Hotel in Toronto, August 14-17); the keynote address will be given at (10 a.m. on August 14).

(Your topic, of course, is your choice; and we want the motivational-type keynote for which you are so well known). Would (30 to 45 minutes) be appropriate for your presentation?

Will you let me know by (January 20) about your availability and the financial arrangements you require. I'll then send you additional information including the nature of your audience. I very much hope that you will accept).

Sincerely yours,

REMINDER REQUEST FOR SURVEY RESPONSE (SUR1)

Key Items: Remind, enclose a replacement questionnaire.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(Ten days ago), I sent you a questionnaire to obtain your opinion about (our current right to work laws).

Your response is very much needed to complete our sampling. Perhaps the questionnaire has been lost, so I'm enclosing another. Please take just a couple of minutes to complete it. The enclosed envelope needs no postage.

Thanks very much for your help.

Sincerely,

PREPARING QUESTIONNAIRES (SUR2)

Key Items: Begin with easy items, make response simple.

Study of the "California Newsletter"

1. Do you read the "Californian"? (please check)

always_____ never_____ sometimes_____

2. For each of the following types of items, check the degree to which you think the coverage is adequate:

	Excellent	Average	Poor
News of company achievements	_____	_____	_____
News of fellow employees	_____	_____	_____
Information on job openings	_____	_____	_____
Information on company operations	_____	_____	_____
Information on the savings industry	_____	_____	_____
News about company sporting leagues	_____	_____	_____

3. How do you believe the paper could be improved?

4. What is your job-grade level?

5. How many years have you been with the company?_____

Thank you for your help. Please drop this questionnaire in the box provided in the cafeteria or return it by company mail to the "Californian."

REQUESTING A RESPONSE TO A SURVEY (SUR3)

Key Items: Flatter recipient, minimize effort required.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear Customer:

Your opinion is very important to us in our efforts to bring you the (best service possible at the lowest cost to you).

Please take a few minutes to complete the enclosed questionnaire about (your electric service). Then simply return it in the enclosed postage-paid envelope.

We'll be grateful for your help in providing this vital information.

Sincerely,

THANK YOU FOR A SPECIAL KINDNESS (TKY1)

Key Items: Thanks, personalize details, end with thanks

(name)

(address)

(city, state, ZIP)

Dear ():

How can (I) possibly thank you enough for (all your help to Helen and the kids during my recent illness). (Although I thought I was doing fine, I know there were lots of times when I was on the brink...)

(All that meant Helen was running almost day and night. And you, old friend, on top of picking up much of my load at the office found time to do some shopping, run errands, and even baby sit. You and Mary deserve medals for being so generous with your time and energies.)

(We) are ever in debt and extremely grateful. You are wonderful.

Most sincerely,

THANKING A CUSTOMER WITH A FOLLOW-UP GIFT (TKY2)

Key Items; Thanks, present the gift, show appreciation

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(We, at Lawry's), want you to know just how very much (we) appreciate the opportunity to (cater your company barbecue each year). It is not only good business for us, but those who actually do the work say they enjoy the fellowship and the warm way in which they are accepted.

Please accept the enclosed (certificate for four dinners at our La Cienega Steak House) as a small token of (our) appreciation.

(We) like your confidence in (us). It's always a pleasure to work with you.

Cordially,

THANK YOU FOR INFORMATION RECEIVED (TKY3)

Key Items: Extend thanks, show interest.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Thanks very much for (sending 35 copies of your annual report).

(These will come in very handy for our study of financial statements in the Introduction to Business course.) I appreciate your generosity.

Sincerely,

THANK YOU TO A GOOD DEALER (TKY4)

Key Items: Thanks for past support, give accomplishments.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

(Rayco just completed the most successful year in its history.)
As (president), I'd like to take the credit; but great
leadership didn't do the job.

People like you who have ordered, pushed, sold, and reordered
(Rayco) products made our successful year because of your loyalty
and friendship. You are, quite simply, a good person to have on
our team.

The future even looks brighter, and we know you'll play a role in
it. Thanks so much for your support.

Cordially,

THANK YOU FOR COURTESIES EXTENDED (TKY5)

Key Items: Thank you, build good will.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Thank you very much for the courtesies you extended (Bill
Whittinghill) when he called on you last week.

(Bill was most impressed by the insight you shed on the nature of
your community, the scope of senior adult activities, and the
opportunities for our firm to serve.)

I know you must have devoted much valuable time to your
discussion (and luncheon with Bill). We thank you and hope you
will call on us when we can be of service.

Cordially,

THANK YOU TO PROMPT PAYING CUSTOMERS (TKY6)

Key Items: Complimentary tone, pleasure to serve

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Much of my correspondence is with customers who have payment problems. But you are different!

I want you to know how much we at (Buffums) appreciate the prompt way you have handled your account for the past (several years). All too often, businesses seem to take good customers for granted. But we don't.

We have enjoyed the opportunity to serve you, and we look forward to continuing our pleasant relationship. Thanks again for being different!

Sincerely,

THANK-YOU MESSAGES (FOR A GIFT) (TKY7)

Key Items: Thanks, indicate use of the gift

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

I am delighted with the (handsome plaque you gave me in recognition of my years of work and fun for the Boy Scout movement). (It now hangs prominently in my office.)

Thanks so very much for your kindness.

Sincerely,

THANK YOU MESSAGES (BUSINESS) (TKY8)

Key Items: Express thanks, show appreciation.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

This note is simply to thank you for your letter of introduction which enabled me to (see Mr. Albert Swain in Seattle). (He said many nice things about you, by the way.)

(Mr. Swain and I laid the groundwork for what may be a very successful relationship. I very much appreciate your taking the time to help me, and I hope I have an opportunity to return the favor.)

Cordially,

THANK YOU MESSAGES (AS A GUEST) (TKY9)

Key Items: Say something specific.

(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ():

(We had a wonderful time this weekend, and Jack and I still have our rosy glows from the swimming and the sun bathing. The Barkers were just as charming as you said they'd be.)

You were kind to invite us. Thanks again for everything.

Very sincerely,

THANKING GOOD CUSTOMERS ON SPECIAL DAYS (TKY10)

Key Items: Be thoughtful, don't push for business.

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

As the (Christmas season) approaches, I'm always reminded of the many things we at (Wesson Industries) have to be thankful for. The first thing, of course, is the wholesome relationships we have with good customers like you.

It seems like such a short time, but this makes the (15th) year we've been doing business together.

I've enjoyed all those years, (Frank), and extend my very best wishes along with those of my colleagues for a warm and bountiful (holiday season).

Cordially,

THANK-YOU TO A CUSTOMER FOR A REFERRAL (TKY11)

Key Items Thanks, review details, offer reciprocity.

(date)

(name)

(company)

(address)

(city, state, Zip)

Dear ():

(Yesterday a gentleman named Howard Walker came into my office with a problem of selecting several gifts for his company's annual employee recognition dinner.)

I'm glad that you thought so much of (our selection) to recommend us to him. (He left only after ordering over 50 handbags, attache cases, and cameras--an order that came to several hundred dollars!)

Although I might have difficulty reciprocating in kind, I'll call you next week to get even with you--even if a trifle--if we can find a convenient day for lunch.

Cordially,

ORDERS--THANKS FOR PROMPT DELIVERY (TKY12)

Key Items: Extend thanks, stress promptness, close cordially

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Many thanks for delivering our recent order so promptly.

Service is a quality that retains customers, and your promptness is a symbol of good service.

I look forward to continuing our mutually valuable relationship.

Cordially,

TRANSMITTING PAYMENT TO ORDINARY (DISAPPOINTING) SPEAKER (TRN1)

Key Items: Transmit payment, don't mention performance

(date)

(name)

(company)

(address)

(city, state, ZIP.)

Dear ():

Enclosed is a check for (\$300), your honorarium for your presentation at the (ARA conference).

From all reports, the (conference) as a whole was (well) received. We thank you again for your taking part in it.

Cordially,

TRANSMITTING ROUGH DRAFTS FOR REVIEW (TRN2)

Key Items: Transmit, add coments, close with thanks

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

Here is a rough draft of (the minutes of the November meeting of the Executive Committee).

(Although I took careful notes), I'd like you to review the draft and to make any comments or corrections. (Simply write them on the draft.) In particular, I'd like you to check the dollar figures for accuracy.

Thanks very much for your help. When you return the draft, (I'll distribute the final version).

Cordially,

TRANSMITTING A CONTRACT (TRN3)

Key Items: Transmit, give instructions, close cordially

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ()::

The original (and two copies) of the contract between us for the (textbook project are) enclosed.

Please review the contract and sign (all three copies) on the lines indicated. (Then send them to Dr. Baty for his signature. When all is complete, I'll send each of you a copy for your files.)

(This is going to be an exciting project and, I'm sure, a profitable one.)

Cordially,

TRANSMITTING MATERIALS IN ANOTHER PACKAGE (TRN4)

Key Items: Identify separate mailing, close cordially
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ()::

(The sample packet of training materials for in-house instruction in business writing) has been (mailed) in a separate package and should reach you in (a day or two).

I will be interested in your evaluation of the materials. They have been (well accepted).

Cordially,

TRANSMITTAL LETTER (TRN5)

Key Items: First, mention the enclosure, include details
(date)

(name)
(company)
(address)
(city, state, ZIP)

Dear ()::

Here is the material you requested about the (summer Scandinavian trip).

(An application form is at the end of the brochure. Notice that a \$100 deposit must accompany the application.)

(I hope you will be able to participate in this fine experience.)

Sincerely,

TRANSMITTING FINAL PAYMENT ON ACCOUNT (TRN6)

Key Items: Transmit check, extend thanks

(date)

(name)

(company)

(address)

(city, state, ZIP)

Dear ():

Here is our check for (\$997.80), which represents the final payment on our account as specified on the enclosed copy of your statement.

Thank you for the convenience extended us.

Sincerely,

TRANSMITTING PAYMENT WITH PROBLEM (TRN7)

Key Items: Enclose payment, explain discrepancy

(date)

(name)

(company)

(city, state, ZIP)

Dear ():

Enclosed is my check for (\$98.00) in payment for your statement of (July 31).

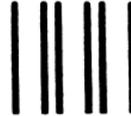
Although the statement shows (\$100) as payment due, (I was not credited with the 2 percent discount to which I was entitled as a charter member of the Buyers' Guild). (I presented my membership card to the clerk at the time of my purchase. It is #3219.)

I am pleased with my purchase and hope our records are now in agreement.

Sincerely,

Delta Point

711 West 17th St. ■ Unit B10 ■ Costa Mesa ■ CA 92627

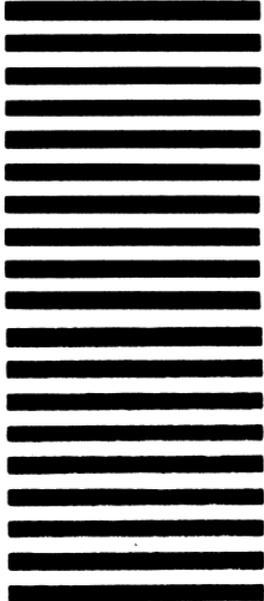


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WARRANTY REGISTRATION

Please fill out this card to be registered with DELTA POINT for receipt of new product and update announcements.

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CITY/STATE/ZIP: _____

Would you please answer a few questions to help better serve our customers?

HOW DID YOU LEARN ABOUT THE *LETTER LIBRARY*?

Magazine Ad Store Friend Other: _____

HOW WOULD YOU RATE THIS VOLUME OF THE *LETTER LIBRARY* SERIES?

Outstanding Excellent Good Needs Improvement

WHAT COMPUTER DO YOU USE:

At home: _____ At Work: _____

WHAT WORD PROCESSING PROGRAM DO YOU USE?

At Home? _____ At Work? _____

WHICH FUTURE *LETTER LIBRARY* SERIES VOLUMES WOULD YOU BE INTERESTED IN?

Legal Social & Civic Real Estate Humor Other: _____

HOW MUCH RAM DOES YOUR COMPUTER HAVE? _____

COMMENTS: _____

Thank you.

The Letter Library Series™

The Business Letter Library™ saves you time and helps you write more effective, persuasive business letters - without really writing.

Hundreds of professionally-written model letters on disk give you an effective letter for almost any business situation.

It's ready to use with most word processing software. It's easy, too - no new commands to learn or files to convert.

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Find the letter you need. Fast. With the LetterSearch™ feature of *The Business Letter Library* you can easily select just the letter you need, in seconds.

Quickly personalize any letter from The Business Letter Library with your own word processing software, or use our KeyStyle™ mode as your guideline for a more customized letter.

Business letters that get results:

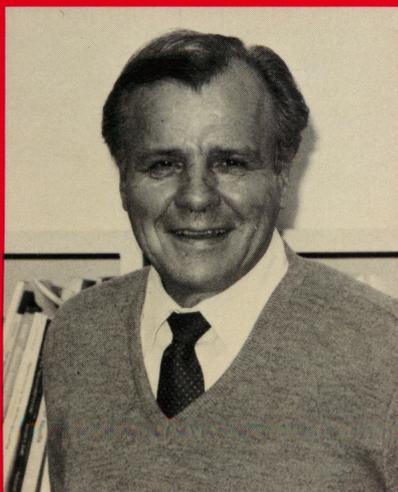
Sales letters that get new customers and keep old ones. Letters to set up sales calls and meetings. Introduce sales proposals. And more;

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Company correspondence. Model letters to help you write persuasive inter-office memos, staff reports, and presentations.

Letters that motivate. Model human relations and personnel letters for many business situations.

It makes words worth processing.™ Whether you need to write many routine letters or a single very important one, use *The Business Letter Library* for letters that get results.



The Author:

William C. Himstreet, author of *The Business Letter Library*, has taught over 250,000 business managers the art of effective business letter-writing through his best-selling college text, *Business Communications* (Kent Publishing Company, Boston, 1983), and eleven other business communications books.

A nationally-recognized expert in the field of business communications, Mr. Himstreet was a Professor of Business Communications and Associate Dean of the Graduate School of Business at the University of Southern California.

Mr. Himstreet is a noted speaker on the subject of business communications and has also served as a business communications advisor to numerous major corporations.

Highlights:

Here's just a sampling of the letters available in *The Business Letter Library*:

- Meetings
- Thank yous
- Confirmations
- Employees
- Sales
- Orders
- Requests
- Reminders
- Reservations
- Acknowledgements
- Job applications
- Transmittals
- Apologies
- Memos
- Recommendations
- References
- Surveys
- Promotions
- Hiring
- Complaints
- Invitations
- Speakers
- News releases
- Collections
- Appointments
- Credit
- Reports
- Bids
- Agendas
- Referrals
- Retirement
- Special events
- Condolences
- Congratulations
- Claims and adjustments
- Position appointments
- Miscellaneous

See *The Business Letter Library User Reference Guide* for the complete listing of letters contained in each of these categories.

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