

Business letter checklist

When you need to compose a business letter to your partner or customer, you need to think it over carefully and remember to follow the rule of four "C". It states that the letter should be: complete, concise, correct and clear. Using the business letter checklist you can establish fine business connections with your partners and customers.

1. Creating letter draft

- ☐ Make sure you have email-client software installed on your PC (e.g. Outlook, The Bat, etc.)
- ☐ Create a new letter template using email-client software
- ☐ Set dateline in appropriate format (July 10, 2008)
- ☐ Insert correct email address of the partner/customer
- ☐ Add if needed other email addresses to CC field
- ☐ Type correct salutation according to addressee's position (Dear Ms., Gentlemen, or other)
- ☐ Type your signature and reference initial in appropriate format
- ☐ Read the letter and check spelling
- ☐ Save the letter

2. Composing letter body

- ☐ Make the letter subject as simple as possible
- ☐ Introduce yourself and your company in the first paragraph (introduction)
- ☐ Describe the letter idea and actually your offer (request)
- ☐ Use facts and example to support your viewpoints
- ☐ Use simple words, concise sentences and short paragraphs
- ☐ Keep your letter body to the subject
- ☐ Use color and text styles to emphasize main points (but do it too hard)
- ☐ Enclose documents: commercial offer, pricelist, contract, charts, VCard, and other
- ☐ Don't enclose too much information (it's better to give a download link)
- ☐ Appoint the date of your next letter in the last paragraph
- ☐ Enable the addressee to ask questions any time (Please, feel free to contact me)
- ☐ Ask for the quick reply and give appropriate closing (We will be appreciated for your prompt reply)

3. Sending letter

- ☐ Set letter priority (Urgent, High, Low, etc.)
- ☐ Switch on letter receiving and reading confirmation reports
- ☐ Send the letter
- ☐ Make sure that the letter was successfully sent (check Sent Mail folder)
- ☐ Add task to your task planner (e.g. the task "Wait for the company's answer till 9/20/2008")

4. Answering

- ☐ Carefully read the received correspondence
- ☐ Highlight the idea and main points (deadlines, names, titles, contacts, etc.)
- ☐ Understand if you reached consent with your partner/customer
- ☐ Reply promptly
- ☐ Thank the partner/customer for reading your letter
- ☐ Answer the partner/customer requests in the first paragraph
- ☐ Give a short explanation why your answer is like that
- ☐ Use facts, details, examples and personal experience to describe your viewpoints
- ☐ Apply concrete words and examples
- ☐ Keep your answer to the subject
- ☐ Be as friendly and politely as possible
- ☐ Add notes to your daily planner

Document Management Checklists

In this section, checklists for managing documents are listed. They include a number of guidelines and tips to help you create various documents, such as reports, business letters, project plans, and meeting agendas. Read this section to find out more.

- [Document Planning Checklist](#)
- [Report Making Checklist](#)
- [Business Letter Checklist](#)
- [Meeting Agenda Checklist](#)
- [Meeting Checklist](#)
- [Conference Planning Checklist](#)
- [Electronic Records Management Checklist](#)
- [Sales Presentation Checklist](#)