

Writing for the customer

Every day, organisations send out millions of letters, notices, e-mails. They give out hundreds of leaflets to people who come to hospitals, surgeries, clinics, offices, libraries, leisure centres, and so on. They have websites and all kinds of electronic means of communicating. All this means a large part of our reputation and image depends on how well we put ourselves across *in writing*. What we say, and how we say it, helps others to form an impression of us.

It isn't just a matter of image, it's a question of time too. Think of the time wasted when what you have written isn't clear to the person reading it, and you or someone else has to try to clarify what was meant and sort out any repercussions from the misunderstanding.

This section contains some practical suggestions to help you when you are writing and to make what you write easier for the customer to understand.

These are general guidelines. You will also need to refer to your employer's standard requirements and procedures, house style, etc.

1. Content

Be sure you know what you want to achieve before you start writing. Are you giving information, or a warning, or answering a series of questions, or asking people to do something?

Write down the key points you want to get across and then make sure you have them in the logical order. Will the customer know what to do as a result of reading this?

Remember that your customers are not likely to understand the sort of jargon you and your colleagues use as verbal shorthand around the workplace. Few of them will have any clear idea about how you operate so you need to explain any procedures or the reasons behind decisions fully.

Think about the best format for getting across your points. It may be a straightforward piece of text. Perhaps a checklist would be helpful, or a question-and-answer format to lead the reader through a complicated series of points. Diagrams and visuals can be useful too.

Think about what your reader is going to be more interested in, and get to the point as quickly as possible, then go on to expand and explain why this is the case. Try to put yourself in their shoes – what are the main concerns or benefits to them? What steps do they need to take to do something? How will a particular scheme affect them?

2. Timing

Answer all customer queries as quickly as possible. If you can, send a full answer within five working days of the receipt of a letter. If this isn't possible, send an acknowledgement within five working days, telling them who is dealing with their query and that person's telephone number and email address. It's important to manage their expectations, so tell them how long they can expect to wait before getting a full reply and any information you can about what will happen next.

A full reply should be sent within ten working days from receipt. If you still aren't able to send all the information required, send a holding letter, explaining why it is taking a little longer to reply, when they can expect to receive a full reply and reminding them who is their contact and the appropriate email address and telephone number.

In some cases, you may decide that the best way to respond to a customer's letter is to telephone or visit them. Make a note of what you do and when on the file so that your

response and the action you have taken is clearly logged. Make sure you inform anyone else who might need to know what you have done.

3. Style

Once you have decided what you want to say, and the order you want to say it in, you can think about the way you say it.

Use short, familiar words. Most people don't use words like "ascertain" or "remittance" or "service user" in their everyday speech. Instead, they say "find out", "payment" and "people". Very formal terms or OT/NHS/Council jargon may make you sound bureaucratic and pompous. Worse still, people may not understand what you say.

Only use as many words as you need to say what you want and cut out superfluous phrases like "I would like to remind you that ...". Keep sentences to about 10-15 words; if your sentences are longer, the reader may lose your train of thought. Sounds extreme? Research has shown that less than a quarter of the population can easily understand sentences of 17 words! If you have a series of things that you need to tell your customer about, it may be clearer to present them as a list.

Long words and sentences may sound impressive, but if your reader doesn't understand them, then you will have failed in your main aim, which is to get your message across.

Use the active form of verbs. For example:

ACTIVE FORM

I recommend that
I will send you a letter
I am sorry that
X has told me

PASSIVE FORM

It is recommended that
A letter will be sent to you
It is regretted that
I have been informed by X

If you use the active form, you will use words like "I", "We" and "You" which makes what you write sound personal. If you use the passive, what you write will sound more formal and impersonal. People are likely to respond better when they feel they are dealing with a real person and not a bureaucratic machine.

4. Presentation

Here are a few points to think about when you are writing for the customer.

- If you know the name of the person you are writing to, use it. For example, say "Dear Mr Jones" rather than "Dear Sir", then you can sign off with "Yours sincerely" rather than "Yours faithfully". Avoid using both christian name and surname (e.g. Dear Pat Broad).
- Wherever possible, sign the letter yourself, using your first name and surname. Put your name and job title under your signature so that the person receiving the letter knows exactly who they are dealing with.
- If you need to check the content with your manager, do so, but remember that managers don't need to sign everything they check.
- There are some cases where what you write needs to be sent out in the name of a higher authority such as a Head OT or manager. Your employer should make it clear to you which these are.
- Keep standard letters under review. Do they make you sound approachable? Do they communicate your message as clearly as they should? Is there any way you can redraft

them to improve them?

- If you are sending a letter or email out to a lot of people, include a circulation list. It can be very helpful to know who else has received a copy.

5. Context

The acid test is whether you are conveying what you wanted to, and whether the tone and feel of the writing is right for the circumstances. Try out tricky letters on colleagues and see how they'd feel about receiving what you've written. Are they unclear about anything?

6. Conclusion

Using a plain and direct style doesn't mean that what you write should be unduly familiar or even disrespectful. You can manage to sound approachable without becoming too personal.

Nor does it mean that we have to sound friendly all the time if this is inappropriate. What we can do is make sure that what we write is clear and courteous, and that we explain the reasons behind the rules.

Do

- Know what you want to say
- Write with your customer in mind
- Keep the language simple
- Use short sentences whenever possible
- Use active verbs, not passive ones
- Use names in letters and emails – both your own and your customer's
- Sign letters whenever possible
- Only write what you would be happy to receive if you were the customer

Don't

- Assume knowledge, make sure you explain but don't be patronising
- Use jargon or OT/NHS/Council-speak
- Be long-winded
- Forget you represent the organisation as a whole to your customer
- Forget to reply within a reasonable time scale – people expect a response to an email much more quickly than a reply by letter
- Forget to tell other people within the organisation what is going on if they need to know