

TIPS FOR WRITING PROFESSIONAL & EFFECTIVE CUSTOMER SERVICE-ORIENTED EMAIL



BEST PRACTICES FOR WRITING EFFECTIVE BUSINESS EMAIL



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CUSTOMER SERVICE EMAILS: WHY ARE THEY SO IMPORTANT?



- There are times when a brief and more relaxed style of work email is appropriate between colleagues or between supervisors and staff. But there are also times when it's important to write clear, concise, efficient emails in order to professionally and successfully relay information, answer questions, or resolve issues for a customer base that your position supports.

USE THE FORMULA



➤ When constructing a customer service-oriented email to someone who's contacted you with a problem to solve or a mistake to correct, remember these steps:

- ✓ Apologize
- ✓ Acknowledge
- ✓ Alert
- ✓ Act
- ✓ Follow-Up

APOLOGIZE



- This is not a personal apology or an admission of wrongdoing. It's an expression of empathy that goes to building personal rapport, the most important element in customer service.

For example:

“I’m sorry that you’re experiencing trouble.”

ACKNOWLEDGE



- Explain the problem back to the person in your own words, so that they know you're listening and that you understand their problem.

For example:

“I’m sorry that you tried to enroll in health benefits over the weekend and were unable to log in to the system.”

ALERT



- Explain to the person what you're going to do to help, and provide a time estimate for how long it might take.
- If you can't do anything to help, explain why. If there's a policy in place that prevents you from helping, point to the policy.
- If you can't help, direct the person to other resources, i.e. other support channels, online resources, or another office or staff person who could help.

ALERT, contd.



For example:

“I’ll call the Benefits Office this morning to try to determine what the issue is. If things appear to be okay on their end, you’ll need to call the Benefits Helpline (1-888-PENN-BEN) to ask for assistance. While I’d be happy to call the Helpline on your behalf, privacy policies prevent me from doing so.

I’ll be back in touch soon to let you know if I’ve resolved the issue or if you’ll need to take the next step. I hope to have more information for you later today or tomorrow.

Again, my apologies for the inconvenience.”

ACT



- If you've indicated there's something you can do to fix, or attempt to fix, the problem, proceed in a timely manner.
- Many customer service-oriented emails we receive aren't about problem-solving, but are simply requests for information. In these cases, gather the information needed and reply as quickly as possible.

For example:

“I’ve attached the information you requested this morning. If you have any questions or need anything else, please let me know.”

FOLLOW-UP



- If you've done something to correct the problem, contact the person, explain what you've done, and ask if it's been resolved to their satisfaction.

For example:

“I spoke to the Benefits Office and they confirmed that your status as a new employee was approved in the benefits system on Sunday night. If you were trying to access the system prior to that, you would have been unable to do so. Please try to log in again today, and if you continue to experience problems call the Benefits Helpline (1-888-PENN-BEN) to ask for assistance. Again, privacy policies prevent me from calling on your behalf.”

Please let me know when you've successfully accessed the system and enrolled in your benefit plans. If you continue to experience problems, I'll be happy to provide additional assistance.”

FOLLOW-UP, contd.



- If you were unable to help and had initially directed the individual to other resources, follow up in a reasonable amount of time to ask if they were able to get the problem corrected.

For example:

“I’m writing to see if Jane in the Benefits Office was able to help you with your problem accessing the benefits system. Please let me know if the issue has been resolved or if you’re still experiencing trouble.”

GENERAL EMAIL TIPS/BEST PRACTICES



Following is a collection of email tips, reminders, and best practices to keep in mind as you communicate with your colleagues and others inside and outside the Annenberg community.

GENERAL EMAIL TIPS/BEST PRACTICES



- Write a meaningful Subject line.
 - Subject lines should be clear and informative. The reader should be able to determine the subject of the email without having to open and read it.

- Send work emails during work hours.
 - As much as possible, emails about work should be sent during work hours in order to ensure that messages are getting the attention they deserve, and that recipients can appropriately read, reply, add items to their calendar, etc.

GENERAL EMAIL TIPS/BEST PRACTICES, contd.



- Avoid excessive cc'ing on messages. Only copy someone who absolutely needs to be part of the conversation or needs to be aware of the information in the message.
 - When cc'ing several people on a message, it may be helpful to highlight the name of the person whose attention to the message is most needed.
 - Sometimes it's appropriate for someone to be copied on the original email but not on the subsequent conversation. Think about what's appropriate for the situation.
 - When using someone's personal email address on a group email, consider using *Bcc* rather than *To* or *Cc* -- *Bcc* in order to hide their email address from the group.
- Be mindful of what you forward from others who've written to you. Someone who's emailed you may not want their original message shared with someone else. Don't assume it's okay, ask.

For example:

"Is it okay if I forward your message to Mary to get her input?"

GENERAL EMAIL TIPS/BEST PRACTICES, contd.



- Avoid forwarding lengthy email strings.
 - Try not to overdo it when forwarding an email string to share information. Emails with multiple forwarded messages can become confusing and difficult to read, particularly on handheld devices.
 - Avoid the “See below” approach. Instead, summarize key information from the emails in a few sentences so the reader can quickly determine what the main points are.
 - Forward only what’s necessary in order for the reader to have context about the issue, and be sure to delete unnecessary text such as repetitive headings, signature lines, and contact information (but be careful to keep email date and time information intact where appropriate/necessary).
 - Be clear about why you’re sharing the information. Is it informational only? Are you asking a question? Are you asking the recipient to do something?

GENERAL EMAIL TIPS/BEST PRACTICES, contd.



- Keep your font selection and color simple and professional in order to keep emails easy to read on a variety of devices.
- Distinguish between formal and informal situations and write, proofread, and spell-check accordingly.
- Always double-check before hitting “Reply All.” Is it really necessary? Are you *sure* you want to reply to everyone?
- Don’t assume privacy. Don’t send anything over email that you wouldn’t want posted in public. Consider using Dropbox or [Penn's Secure Share service](#) instead.

ADDITIONAL RESOURCES



WANT MORE?

- Penn's Division of Human Resources Learning & Development Office offers email writing workshops every few months. Check out their website for upcoming courses: <https://www.hr.upenn.edu/myhr/learning>.

- Online resources:
 - <https://support.office.com/en-us/article/Outlook-2007-Best-Practices-Write-great-e-mail-aa9c7d9e-a3f5-4f8d-bbd3-cf55f11b2df3>
 - http://www.goodwithwords.com/email_best_practices.pdf
 - <http://money.usnews.com/money/blogs/outside-voices-careers/2015/05/19/do-these-4-things-before-sending-an-email>