

CHAPTER 1

Planning the letter

Planning is a key factor in the accomplishment of any goal. Letter writing is no exception. To successfully construct a clear, effective letter, you need a good plan.

Some letters do not require as elaborate a plan as others. A letter to a customer detailing a proposal for a product purchase will obviously need a more elaborate plan than a thank-you note for a business lunch.

Common sense can usually dictate how elaborate your plan needs to be. If the information you need to present in a letter is limited enough for you to outline it in your head, there is no real need for a detailed outline featuring Roman numeral headings and sub-points beneath sub-points. The elaborateness of your plan should suit the elaborateness of the letter to be written.

Of course, if you, as a letter writer, are more comfortable constructing a detailed outline for each of your letters, there's nothing wrong with following that procedure. With enough practice, however, the simpler letters should flow more easily, and the time you might have spent laboring over outline after outline can be directed to other areas of your business.

The following three steps are essential in the planning of any letter:

1. Researching the facts
2. Analyzing the subject and reader
3. Knowing your objectives and how to accomplish them

If you follow these steps as you are planning to write any letter, you should find that your letters will be clear and well received, and will achieve your desired goal.

Researching the Facts

Before you write a letter, it makes sense to know what you plan to talk about. If you wing it and write whatever comes into your head, chances are you'll end up with a confused, ineffective letter.

Get the facts together before you write anything resembling a first draft of a letter. For example, if you are corresponding with a customer, examine all previous correspondence with him or her. Depending upon the volume of this correspondence, and assuming the customer to be a fairly good letter writer, you can learn a good deal about the personality, interests, and values of the person to whom you are writing.

As you examine previous correspondence, jot down a note or two about some key traits you discover about this customer. For example, you have gone through your correspondence file for a potential customer named Sam Johnson. From what he has written you realize the following things about him. He:

- Is committed to existing business relationships.
- Places importance on a personal relationship between the professional and the customer.
- Often suggests ideas for improving business practices and professional/customer relationships.
- Has a strong interest in reducing costs.

After jotting down this information, try to visualize the person to whom you are writing. You know something about the customer's interests. To learn more, you might examine the file on business dealings with the customer. If you learn as much as possible about your reader, you'll find it easier to write a letter directed to him or her.

After you have collected some facts on your customer, you should direct your attention to the topic or topics to be covered in the letter. The simplest and ultimately most effective thing to do is to take a piece of paper and write down those topics you plan to cover. Under each topic you might write some examples or a few words recalling a discussion you might have had with your customer about it.

Let's stick with the example of potential customer Sam Johnson. You've already had a business meeting with Mr. Johnson and you want to write a follow-up letter. You already know something about his personality from the earlier research you did, and of course, from impressions formed during the course of your meeting. You decide you want to cover the following topics in your letter:

- Thanks for meeting
- His idea for a lockbox
 - Speeds up collections
 - Cost-effectiveness
- Appreciate his views on business
 - Loyalty to existing business relationships
 - Personal relationship
- Arrange for another meeting

The order in which you write down ideas for topics is unimportant at this point in the planning stage. The main thing is to make sure the letter covers the topics that will let customer Johnson know you are writing to him about issues that are of concern to him.

Timeliness is extremely important in any letter, including the one we are using as an

example. You want to get a letter to your customer while the topics being discussed are still fresh in both of your minds. As you are doing your research, determine how long discussion has been taking place about the topics to be included in your letter and what, if any, action has already been taken. A fundamental rule to remember in all of your correspondence is that timeliness is essential for effectiveness.

Analyzing the Subject and Reader

You've completed your research. You know something about the person to whom you're writing. You have a good idea what topics will be covered in the letter. The information you've gathered must now be analyzed so you can logically organize it for the best results.

An outline is a good method of organizing topics and visualizing the order in which you wish to discuss them in the letter. You can order the letter chronologically, by importance of the topics discussed, or in whatever order is most effective. Your choice is flexible, but it must be logical and you should not mix thoughts in sentences or drop them before they are completed.

Continuing with the example of the follow-up letter to Sam Johnson, you might decide to outline your letter as follows:

- Paragraph 1. a. Thanks for meeting
 - b. Appreciate views on business
 - (1) Loyalty to existing business relationships
 - (2) Importance of personal relationships
- Paragraph 2. a. Idea for lockbox
 - (1) Speed up collections
 - (2) Cost-effectiveness
- Paragraph 3. a. Arrange for another meeting

You'll notice that the only difference between this rough outline and the list of topics jotted down earlier is the order. The ordering of topics is an important function of the outline.

With a letter as simple as this follow-up to Sam Johnson, it is perfectly acceptable to outline the topics in your head and go directly to the rough draft of your letter. The important thing in writing an effective letter is not writing a good outline, but rather being able to write a letter that is ordered logically and is structured well enough for you to know where it's going. If you can do this in your head, fine. You may have to work out some kinks in the rough draft, but if you can save yourself some time and still write an effective letter, more power to you. As your letters become more elaborate, you may find that working with a written outline helps to remind you of all the facts and the best order in which to present them.

When you analyze the subject matter to be covered in your letter, you should also keep in mind the research you did on your customer. Your research can serve as a brief analysis of your customer's personality, interests, and values. This information is important to keep in mind as you organize the information to be included in your letter. What's

important to you may not be as important to your reader. Your letter must be aimed toward your reader.

With outline in hand or in your head, you can now begin to write your letter. Keep in mind that, in order to be as clear as possible, you should write simple sentences, avoiding any unnecessary information. Don't try to combine ideas in sentences. In order to get your point across most clearly, write about one thing at a time. For example, when you write the first paragraph of your letter to Sam Johnson, don't try to thank him for the meeting and express your appreciation for his views in the same sentence. Take one thought at a time.

Thank you for an interesting meeting yesterday. I appreciate the time and information you shared with me.

Avoid any excess in the sentences of your letter. If you start rambling, you are bound to get off the track and lose your reader. Remember, to be effective in letter writing you must grab your reader's attention and make that reader react positively to whatever it is you're writing about.

Another important thing to remember is that ideas placed at the beginning or end of a paragraph stand out most clearly to the reader. This placement of ideas is a good practice to use for emphasis in your letter writing.

Knowing Your Objectives and How to Accomplish Them

Set an objective for every letter you write. If you want a customer to accept credit terms you are offering, keep that goal in mind as you plan and write your letter. Stay focused on your goal as you choose the order of each paragraph and the wording of each sentence.

The research you did before beginning to write to your customer can help you decide how best to write the letter that will be most effective in getting your reader to react the way you would like. Your research can help make you familiar with your reader and what might have moved that reader to act in the past.

The objectives of your follow-up letter to Sam Johnson are to thank him and to attract his business. You know the value he places on loyalty to existing business relationships and on a personal relationship between the professional and the customer, so you might express your understanding of these values. It also might be a good idea, knowing Mr. Johnson's ability to make good suggestions, to react to a suggestion he might have made at your original meeting. Since your goal is to attract his business, closing your letter by telling him you'll call to set up another meeting is a good approach. Such a closing lets Mr. Johnson know you appreciate his ideas and are eager to meet with him again to discuss the possibility of doing business with him. Consider the following example of the complete text of a letter to Mr. Johnson:

Thank you for an interesting meeting yesterday. I appreciate the time and information you shared with me. I understand your sense of loyalty to existing business relationships and the importance you place on knowing and being known by the people you do business with.

During our conversation you suggested that a lockbox arrangement might

speed up the collection of cash available for investment. I would like to investigate this possibility and estimate the dollar benefit to your company.

I will give you a call early next week to arrange lunch together as you suggested. Thanks again for your time. I look forward to doing business together.

Judging from the final letter to customer Johnson, the research, analysis, and knowledge of objectives were handled well by the letter writer. The careful planning in the construction of a letter such as the one above should result in the increased chance of a positive response from the letter's reader.