

Letter Format: Full Block Modified Block AMS Simplified

Letter Type: Direct Inquiry Adjustment Complaint Persuasive/Sales Indirect Inquiry

Competency	Exceeds Expectations	Meets Expectations	Below Expectations
Return Address & Date	<ul style="list-style-type: none"> <input type="checkbox"/> Return address or letterhead is complete & accurate. <input type="checkbox"/> Date is complete & positioned correctly. <input type="checkbox"/> No spelling, capitalization, or punctuation errors. 	<ul style="list-style-type: none"> <input type="checkbox"/> Return address or letterhead is complete & accurate. <input type="checkbox"/> Date is complete & positioned correctly. <input type="checkbox"/> 1-2 spelling, capitalization, or punctuation errors. 	<ul style="list-style-type: none"> <input type="checkbox"/> Return address or letterhead is missing some information. <input type="checkbox"/> Date is there but format is incorrect or date is missing <input type="checkbox"/> 3 or more spelling, capitalization, or punctuation errors.
Inside Address & Salutation	<ul style="list-style-type: none"> <input type="checkbox"/> Inside address is complete & accurate. <input type="checkbox"/> Salutation is appropriate & complete. <input type="checkbox"/> A subject line needed or added correctly. <input type="checkbox"/> No spelling, capitalization, or punctuation errors. 	<ul style="list-style-type: none"> <input type="checkbox"/> Inside address is complete & accurate. <input type="checkbox"/> Salutation is appropriate but incomplete. <input type="checkbox"/> A subject line needed or added correctly. <input type="checkbox"/> 1 - 2 spelling, capitalization, or punctuation errors. 	<ul style="list-style-type: none"> <input type="checkbox"/> Inside address is missing information or is missing. <input type="checkbox"/> Salutation is inappropriate or missing. <input type="checkbox"/> Subject line information is misleading or missing. <input type="checkbox"/> 3 spelling, capitalization, or punctuation errors.
Layout and Design	<ul style="list-style-type: none"> <input type="checkbox"/> Letter is creatively designed, eye catching, and attractive with easily read text. <input type="checkbox"/> Effective use of white space. <input type="checkbox"/> Effective use of bullets. 	<ul style="list-style-type: none"> <input type="checkbox"/> Some attempt made to design letter. <input type="checkbox"/> Some attempt to use white space. <input type="checkbox"/> Bullets inappropriately used. 	<ul style="list-style-type: none"> <input type="checkbox"/> Letter appears busy or boring or is unattractive or inappropriate. <input type="checkbox"/> Little or no white space. <input type="checkbox"/> Text is difficult to read <input type="checkbox"/> Bullets incorrectly used.
Closing, Signature, & other End Matter	<ul style="list-style-type: none"> <input type="checkbox"/> Closing is appropriate. <input type="checkbox"/> Written & typed signatures are present. <input type="checkbox"/> Reference initials & enclosure reminder are included if needed. 	<ul style="list-style-type: none"> <input type="checkbox"/> One piece is missing or inaccurate. 	<ul style="list-style-type: none"> <input type="checkbox"/> Two or more pieces are missing or inaccurate.
Word Choice	<ul style="list-style-type: none"> <input type="checkbox"/> Word choice is appropriate for audience. <input type="checkbox"/> Writer uses action verbs and concrete words. <input type="checkbox"/> Use of passive voice ONLY as needed. <input type="checkbox"/> You-Viewpoint & positive tone conveys goodwill, furthers business relationship 	<ul style="list-style-type: none"> <input type="checkbox"/> Word choice is mostly appropriate for audience. <input type="checkbox"/> Writer uses action verbs and concrete words. <input type="checkbox"/> Use of passive voice ONLY as needed. <input type="checkbox"/> You-viewpoint used but detached tone does not further business relationship. 	<ul style="list-style-type: none"> <input type="checkbox"/> Word choice is inappropriate or unprofessional for audience. <input type="checkbox"/> Writer sometimes uses action verbs and concrete words. <input type="checkbox"/> Too much use of passive voice. <input type="checkbox"/> Attempt made at You-Viewpoint: "you" pronouns used occasionally, no rapport established
Content Organization & Accuracy	<ul style="list-style-type: none"> <input type="checkbox"/> Organization is appropriate to the writer's purpose. <input type="checkbox"/> Paragraph order follows the suggested model for direct inquiry, indirect inquiry, or persuasive messages. <input type="checkbox"/> Message is valid, complete, and correct. <p style="text-align: center;">SEE GUIDELINE SHEET</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Organization is appropriate to the writer's purpose. <input type="checkbox"/> Paragraph order is close to the suggested model direct inquiry, indirect inquiry, or persuasive messages. <input type="checkbox"/> One piece of information is missing or incorrect. 	<ul style="list-style-type: none"> <input type="checkbox"/> Organization is not appropriate to the writer's purpose or no organization pattern is apparent. <input type="checkbox"/> Paragraph does not follow suggested model direct inquiry, indirect inquiry, or persuasive messages. <input type="checkbox"/> Two pieces of information are missing or incorrect. <input type="checkbox"/> Message has enough missing or incorrect information to be ineffective in meeting the writer's goal.
Sentences, Paragraphs, & Mechanics	<ul style="list-style-type: none"> <input type="checkbox"/> Concise and complete sentences of varying length. <input type="checkbox"/> Paragraph divisions are effective. <input type="checkbox"/> Number of paragraphs fits suggested format. <input type="checkbox"/> Main purpose of the message is clear. <input type="checkbox"/> No spelling, capitalization, or punctuation errors. <input type="checkbox"/> Grammar & usage are correct. 	<ul style="list-style-type: none"> <input type="checkbox"/> Some variation in sentence length. One fragment. <input type="checkbox"/> Paragraph divisions are somewhat effective. <input type="checkbox"/> Main purpose of the message is clear. <input type="checkbox"/> 1-2 spelling, capitalization, or punctuation errors. <input type="checkbox"/> 1-2 grammar & usage errors. 	<ul style="list-style-type: none"> <input type="checkbox"/> Two or more sentence fragments. <input type="checkbox"/> Message is there, but underdeveloped and/or unclear. <input type="checkbox"/> Awkward paragraph construction clouds the message. <input type="checkbox"/> 3-4 spelling, capitalization, or punctuation errors. <input type="checkbox"/> 3 - 4 grammar & usage errors.

Granting an Adjustment

Note: Unlike direct-order messages, these messages involve a negative situation which must be corrected, and the bad image overcome.

1. Begin directly—with the good news.
2. Incidentally identify the correspondence that you are answering.
3. Avoid negatives that recall the problem.
4. Regain lost confidence through explanation or correlative action.
5. End with a friendly positive comment.

Order Acknowledgements

Note: You may use form messages, notes, or individual messages.

1. Give status of order, acknowledging incidentally.
2. Include some goodwill—sales talk, reselling, or such.
3. Include a thank-you.
4. Report frankly or handle tactfully problems with vague or back orders.
5. Close with adapted, friendly comment.

Claim Message

Note: Claims are bad news and are best written in direct-order since directness strengthens the claim.

1. Begin directly. Tell what is wrong.
2. Identify the situation (invoice number, product information, etc.) in the text or in the subject line.
3. Present enough facts to permit a decision.
4. Seek corrective action.
5. End positively--friendly but firm.