

Email Etiquette Training Class



At CRST Home Solutions, in almost every department, you probably write emails every day – to colleagues, to your boss, to clients and customers. Even if your department doesn't email often, you'll need to know proper email etiquette for those times that it may be needed. How you email says a lot about you and especially about CRST Home Solutions. We need to maintain a level of high professionalism.

So, being able to write a professional, business-like email is a crucial skill. We will cover the importance of the email subject line, but the body of your message also matters.

Remember: When sending an email through DOLI, even if it is brief, it still must be professional.

1. Start with a salutation

Your email should open by addressing the person you're writing to. Sure, you can get away with leaving out the salutation when you're dashing off an email to your friend, but business-like messages should begin with:

- Dear Mr. Jones, or Dear Ms. Smith, (for someone you don't know well, especially if they're a superior)
- If you do not know the gender of the person, address them as "Dear (first and last name),"
- Dear Joe, or Dear Mandy, (if you have a working relationship with the person)

It's fine to use "Hi Joe," "Hello Joe" or just the name followed by a comma ("Joe,") if you know the person well – writing "Dear Joe" to one of your team-mates will look odd!

2. Organize the Content

Make sure your message is written in a way that it is easy to read and addresses the recipient's question or need.

Get straight to the point – don't waste time waffling. Consider using bullet-points for extra clarity, perhaps if you are:

- Listing several questions for the recipient to answer
- Suggesting a number of alternative options
- Explaining the steps that you'll be carrying out
- Address one point or thought in each paragraph
- If you are creating a longer email with paragraphs, each paragraph should address one point or thought.

Put a double line break, rather than an indent (tab), between paragraphs.

When you are responding to an email about a problem, be sure to organize your email in a way that immediately addresses the recipient's concerns first. You can follow that with additional information you may need to also communicate to the recipient.

- First, acknowledge the person's needs or experience.
 - If the main reason for the original email was to report a problem (such as a complaint), recognize the issue the person is expressing.
 - "I appreciate your candid feedback."
 - "I'm sorry that you experienced this."
 - "Thank you for letting me know what happened."
 - Sometimes, people just want to someone to acknowledge their negative experience.
- Second, apologize when appropriate.

An apology is a first step in taking ownership of the issue. In our business, it is important that each of us be willing and able to recognize and accept accountability when something goes wrong. It takes simple human compassion to offer an apology when someone feels they have been wronged.

 - "I'm sorry that this happened to you."
 - "I'm sorry for the difficulties you have experienced."
- Third, accept responsibility for finding a solution or taking the next step.

After acknowledging a problem and apologizing for the experience, let the recipient know that you are there to help them. Approach the issue from the positive perspective by telling the recipient what you can do for them, instead of what you cannot do. Be careful not to make promises you cannot keep.

- “I want to make this right for you. I will call the servicer this morning, and I will contact you with a status update by the end of the day today.”
 - “It’s important to us that you feel satisfied with your service. I will review this issue with my manager and call the store as soon as we have a resolution.
- Finally, follow through on the steps you told the recipient you were going to take, focusing on the positive.
 - “I have great news! As previously stated, I spoke with the servicer and...”
 - “We contacted the store regarding this issue, and we are happy to report that...”

Presenting information in well-organized email that addresses the recipient’s problem or concern first is a way to effectively communicate the information the recipient needs. It can also show the recipient that you are professional, prepared, and proactive in your approach to resolving issues.

3. **Stick to one topic**

If you need to write to someone about several different issues (for example, if you’re giving your team lead an update on a customer’s case, asking a question about a different case, and telling him that you’ve got a doctor’s appointment on Friday), then don’t put them all in the same email. It’s hard for people to keep track of different email threads and conversations if topics are jumbled up.

4. **Use capitals and punctuation appropriately**

Emails should follow the same rules of punctuation as other writing. You should have one thought per sentence. Capitals are often misused. In particular, you should:

- Never write a whole sentence (or worse, a whole email) in capitals
- Always capitalize “I” and the first letter of proper nouns (names)
- Capitalize acronyms (USA) and only use acronyms that are familiar to the recipient. (ex. It may not be appropriate to use “BBY” in an email to a customer.)
- Always start sentences with a capital letter.

This makes your email easier to read: try retyping one of the emails you’ve received in ALL CAPS or all lower case, and see how much harder it is to follow!

5. Sign off the email

For short internal company emails, you can get away with just putting a double space after your last paragraph then typing your name. If you're writing a more formal email, though, it's essential to close it appropriately.

- Use sincerely, (when you know the name of your addressee and when you've addressed it to "Dear Sir/Madam"). This will be used in more formal emails.
- Use Best regards, or Kind regards, in most other situations.
- Even when writing to people you know well, it's polite to sign off with something such as "All the best," "Take care," or "Have a nice day," before typing your name.

6. Use a sensible email signature

Do include your name, email address, telephone number, company name and postal address (where appropriate). It makes it easy for your correspondents to find your contact details: they don't need to root through for the first message you sent them, but can just look in the footer of any of your emails. Please see your Supervisor for specific guidelines for your department. *Note: maintain/update your signature if you change roles or departments.*

Putting it all together

Compare the following two emails from agents confirming with the customer the steps we are taking to resolve their complaint. The content of the emails is identical – but which agent appears the most professional based solely on grammar and punctuation?

Dear Sir. Madam,

I've received your documentation and pictures regarding your complaint against ABC Installation. it dos appear that your floor was damaged due to water damig! The next steps that u need to take in order for us to issue you a check to pay for this repair are as follows:

- Receive an estimate on repair to your damaged floor
- Submit the estimate to CRST Home Solutions at 241 Main Street
Buffalo...ny 14208 to attention

Once i have received the above, I will gladly have our accounting dep. Issue you a check. Thank you for working with CRST Home Solutions.

Sincerely,

Agent Z.

Dear Sir/Madam,

I've received your documentation and pictures regarding your complaint against ABC Installation. It does appear that your floor was damaged due to water leaking out of your newly installed dishwasher. The next steps that you need to take in order for us to issue you a check to pay for this repair are as follows:

- Receive an estimate on repair to your damaged floor
- Submit the estimate to CRST Home Solutions at 241 Main Street, Buffalo, NY, 14208 to my attention.

Once I have received the above, I will gladly have our accounting department issue you a check. Thank you for working with CRST Home Solutions.

Sincerely,

Agent Z.

Have you ever received a really badly written email? Or have you ever been told you need to brush up your own email writing? Share your email etiquette horror stories and any of your tips!

Email Practice

You receive a call where you are required to reach out the servicer via email. Review the scenario below and then compose an email to the servicer and **send it to training@crst.com**.

Customer, Sarah Smith, called in today to update here phone number. Her order, 1234-1234, is scheduled for today. The new phone number is for her cell and she needs the servicer to call her on that number when he arrives, so she can unlock the gate. The new cell phone number is 651-156-4392. You called the servicer already and left a voicemail with this information. The servicer assigned to the order is Fred James.