

Chapter 16

How to Write a Letter to a Client

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| Why. | 1. | Tell the client why you are writing (to update them on status of the case or an issue, to ask a question, to provide an answer to a question they asked, to send them documents to review, etc). |
| Do it. | 2. | Provide the update, ask the question, give the answer, explain the documents, tell them what you want them to do, etc. |
| Get a response. | 3. | If your letter requires a response from the client, tell them <i>how</i> (via email, phone, etc.) and <i>when</i> you need their response (a firm deadline). If your letter does not require a response, then say that (so the client doesn't wonder if they are supposed to respond). If a conference with the client is needed, then ask the client to make an in-office or on-phone (indicate your choice) appointment to discuss the issue and their resulting response. |
| Explain it. | 4. | Tell them why or how the immediate inquiry fits into the case at the moment. |
| Predict the future. | 5. | Tell them what will happen next in the case. |
| Say something good. | 6. | Use the opportunity to say something positive or provide reinforcement. |
| Express thanks. | 7. | Thank the client for their continued patience and assistance and say that if they have any question to let you know and how to contact you (phone, email, etc). |

Notes:

Generally, your message should be sent in the manner that you expect a response to occur (if you want them to email you, then you use email to send the message, etc). However, some things require the personal touch of a phone call.

The letter should generally be less than one page or two at the most.

If appropriate, a copy of the letter should be put in follow up as a reminder for a specific future deadline date.