Your complete do-it-yourself guide

Business Letters & Emails

MADE EASY

198 ready-drafted templates
Guidance notes included
Saves time
# Table of contents

*Acknowledgements*  
[12]

*Introduction*  
[13]

*Index of letters by type*  
[15]

## 1 Managing suppliers  

### Quotations  
- Friendly request for a quotation  
- Formal request for a quotation  

### Quotations – querying  
- Querying a price  
- Refusing a price change  

### Orders  
- Placing an order and requesting delivery  
- Placing an order and clarifying terms  
- Amending delivery instructions  
- Amending the order quantity  
- Ticking off a supplier for not sticking to the order  
- Disputing a supplier’s terms and conditions  

### Invoices and statements  
- Requesting a credit note – incorrect items received  
- Querying invoices  
- Disputing a carriage charge  
- Requesting a refund of delivery charges  

### Requests, enquiries and instructions  
- Requesting further information about a product  
- Requesting consultancy information  
- Advising existing suppliers of a change in terms and conditions  
- Advising a supplier of delivery instructions
Negotiating arrangements
Explaining why a new system is required 22
Informing a supplier of changed terms and conditions 23
Negotiating a rate with a supplier 24
Turning down a supplier 25
Firing a strong warning shot at a supplier 26

Errors
Returning an incorrect consignment 27
Returning a non-conforming consignment 28

Making complaints – friendly and firm approaches
Gentle complaint to a good supplier – keeping him on his toes 29
Friendly complaint about repeated missing items 30
Complaining about repeatedly missing items 31
Complaining that the quality of service is deteriorating 32
Demanding that defective work be made good 33
Non-delivery of goods – initial letter 34
Non-delivery of goods – second letter 35

Making complaints – using a stronger tone
Getting a too-persistent sales representative off your back 36
Letter of complaint about the quality of a product 37
Complaining about a service that fell well below acceptable standards 38
Complaining that a verbal assurance has been broken 39
Firm letter to a supplier over a dispute 40
Stern reply to a negative response regarding a refund 41

2 Managing customers 43

Giving quotations
Providing a quote, ex-works 45
Quoting and advising a potential customer 46
Correcting a pricing error, informally 47
Correcting a pricing error 48

Responding to enquiries and orders
Welcoming a new customer, informally 49
Welcoming a new customer 50
Responding to an international enquiry and outlining terms 51
Requesting an international client to issue a letter of credit 52
Playing one client off against another 53
Querying an order with a customer 54
Confirming packing list details with an international customer 55
Acknowledging an order – goods temporarily out of stock 56
Telling a customer it’s too late to amend an order 57

Making apologies
  Apologising to a person receiving unwanted mail 58
  Notifying a customer that corrective action has been taken 59
  Replying to a complaint about poor service 60
  Apologising to a customer for a delay in supplying a product 61
  Apologising for a missed appointment 62
  Making a gentle apology to an established customer 63
  Explaining an apparent quality defect 64

Apologies with a hint of grovelling
  Apologising for breaking a verbal assurance 65
  Apologising to a customer for items that have not arrived 66

Handling awkward customers
  Handling a customer who is trying it on 67
  Handling a very rude customer 68
  Denying liability following a complaint 69
  Denying a potential breach of contract 70

Refusing customers
  Advising a customer that new orders cannot be supplied 71
  Refusing to accept that a carriage charge be deducted 72
  Negotiating an amendment to an order 73
  Refusing a customer a refund – outside the time period 74

Thanking customers
  Responding to a letter of appreciation 75
  Thank-you letter for hospitality 76
  Thanking a satisfied customer 77
  Thanking a good client, slightly cheekily 78
  Thanking a business associate for a referral 79
### Keeping customers informed
- Appointment of a new General Manager 80
- Personal announcement to a customer about your new position 81
- Reawakening a business relationship 82
- Surveying customer attitudes 83
- Using a customer-service exercise to revive a lapsed customer 84

### Sales and marketing management

#### Sales letters that sell
- Inviting the customer to visualise 87
- Using the lure of large potential gains 88
- Using a force-free trial to increase response 89
- Using curiosity to arouse interest 90
- Seeking new business with a personalised letter 91
- Outlining services on offer 92
- Using a testimonial to gain interest 93
- Selling on enthusiasm, immediacy and personal attention 94
- Telling a story to grab attention 95
- Encouraging a customer to renew a subscription 96
- Following up a meeting to solicit new business 97

#### Requesting an agency
- Declining a distributor’s offer 98
- Asking for an agency 99
- Accepting an agency – outlining the terms 100
- Declining an agency but offering distribution 102

#### Managing an agent’s performance and conduct
- Thanking an agent for obtaining some business 103
- Motivating an agent with an extra discount for higher sales 104
- Complaining to an agent who is acting beyond his powers 105
- Reprimanding an agent who is working for a competitor 106
- Explaining why agency powers have been exceeded 107
- Dismissing an agent for working for a competitor 108

#### Handling queries about an agent’s commission
- Recommending that prices be reduced 109
- Responding to a request for lower prices 110
Asking for more commission 111
Negotiating a request for more commission 112

Notifying agents of changes
Notifying an agent of revised prices 113
Notifying a distributor about a need for a surcharge 114

Managing public relations
Friendly letter to the media about the loss of a key person 115

Dealing with advertising agencies
Confirming an advertisement to an agency 116
Note to an agency about the incorrect position of an advertisement 117
Refusing one offer to advertise and accepting another 118
Making a very low offer to advertise 119

4 Debt collection and credit control 121

Demands for payment
Gently reminding a customer about payment not received 123
Requesting confirmation of when items will be paid for 124
Reminding a customer about credit terms and requesting payment 125
Chasing up a commission payment 126

Stronger demands for payment
Notifying that an account is overdue and requesting payment 127
Requesting payment within seven days 128
Requesting more timely payment 129
Appealing to a customer’s sense of fair play to obtain payment 130

Final demands for payment
Notifying that an account is seriously overdue 131
Requesting payment from a company which seems to be going under 132
Asking for payment in full – keeping up the pressure 133
Announcing court proceedings in seven days 134

Granting credit
Opening an account for a customer 135
Notifying a new trading account 136
Notifying a buyer about a discount for prompt payment 137
Announcing a credit surcharge on all accounts 138

Refusing credit
Sending a proforma invoice 139
Sending a proforma invoice, due to a poor record of payment 140
Complaining about credit terms not being adhered to 141
Writing off a debt and refusing to supply a company 142

Handling queries and disputes
Enclosing a copy of an invoice requested 143
Rejecting an invitation to ‘contra’ invoices 144
Informing a customer that a statement has already been paid 145

Responding to requests for payment
Advising that immediate payment is on its way 146
Advising an international customer that payment is on its way 147

Involving the lawyers
Asking for a quotation from solicitors 148

5 Employing people 149

Interviews and offers
Asking a candidate to attend an interview 151
Confirming an interview appointment 152
Acknowledging a job application 153
Rejecting a speculative job application 154
Rejecting a candidate after an interview 155
Rejecting a candidate who came very close to being appointed 156
Making an offer of employment 157

References
Asking for a reference 158
Replying to a request for a reference 159
Giving a qualified reference 160
Resignations
   Resigning from a job 161

Warnings and dismissal
   First written warning to an employee (for breaching the safety code) 162
   Final written warning to an employee (for breaching the safety code) 163
   Dismissing an employee (for breaching the safety code) 164
   Summary dismissal 165

General announcements and notices
   Announcing a bonus 166
   Advising employees of an intention to relocate 167
   Notifying staff about the resignation of an employee 168

Notices to individual employees
   Notifying an employee of her entitlement to sick pay 169
   Refusing to allow a leave of absence with pay 170
   Notifying an employee about a company loan 171
   Confirming to an employee the termination of her employment 172

Maternity and other leave
   Notifying an employee of her entitlement to maternity pay 173
   Confirming that an employee is not entitled to receive maternity pay 174
   Wishing an employee a speedy recovery 175

Motivating staff
   Motivating an employee whose performance has deteriorated 176
   Using a promotion to motivate an employee 177
   Motivating a team to achieve a goal 178

Offering congratulations
   Announcing a performance award 179
   Appreciating an employee’s special effort 180
   Congratulating the winner of a business award 181

Health and safety
   Reminding staff about the health and safety policy 182
   Reporting a death to the Health and Safety Executive 183
Holiday policy
Announcing extra holiday entitlement 184
Announcing the carrying over of outstanding holiday entitlement 185

Offering sincere condolences
Offering condolences to a bereaved wife 186
Offering condolences to the parents on the sudden loss of a son 187

6 Banking, insurance and property 189

Managing an account
Opening a current account 191
Cancelling a cheque 192
Notifying a bank about a change of signature for cheques 193
Closing an account 194

Loans and overdrafts
Declining an offer to open an account 195
Following up an application for a business loan 196
Informing a bank of your positive current position 197
Informing a bank of your deteriorating position 198

Insurance
Requesting insurance 199
Asking an insurance broker for a revised quotation 200

Property
Asking for a quote to survey a property 201
Instructing a surveyor to inspect a property 202
Making an offer on a property to an estate agent 203
Confirming an offer to an estate agent 204

Finance documentation
Asking the bank to pay on the presentation of a letter of credit 205

7 Business and the community 207

Requests and invitations
Accepting a request for a donation 209
Invitation to present an award at a ceremony 210
Offering support for a community venture 211
Accepting an invitation to speak at a meeting 212

Declining requests and invitations
Declining a request for a donation – pre-existing commitment 213
Declining a request for a donation – criterion not met 214
Declining a request to speak at a meeting 215
Declining a request to serve on a local committee 216

Objections – making and handling
Responding to local residents about a potential disruption 217
Objecting to a planning application 218

Appendix 1 219
Appendix 2 233
Appendix 3 243

Index 253
Index of templates by type

This index is designed to be used with the Contents and the main Index at the end of the book. The Contents gives a good overview of the templates concerned with suppliers, customers, employees and so on. But if you have to write a complaining letter or email (and want to compare these kinds of templates), it is difficult to find them easily by examining the Contents. However, if you look up Complaining in this index, you will find a list of the templates featured that are concerned with this topic and their page number.

Accepting
100 Accepting an agency – outlining the terms
209 Accepting a request for a donation
212 Accepting an invitation to speak at a meeting

Acknowledging
56 Acknowledging an order – goods temporarily out of stock
153 Acknowledging a job application

Advising
20 Advising existing suppliers of a change in terms and conditions
21 Advising a supplier of delivery instructions
46 Quoting and advising a potential customer
71 Advising a customer that new orders cannot be supplied
146 Advising that immediate payment is on its way
147 Advising an international customer that payment is on its way
167 Advising employees of an intention to relocate

Amending (see also Correcting)
10 Amending delivery instructions
11 Amending the order quantity
57 Telling a customer it’s too late to amend an order
73 Negotiating an amendment to an order

Announcing
80 Appointment of a new General Manager
81 Personal announcement to a customer about your new position
134 Announcing court proceedings in seven days
138 Announcing a credit surcharge on all accounts
166 Announcing a bonus
179 Announcing a performance award
184 Announcing extra holiday entitlement
185 Announcing the carrying over of outstanding holiday entitlement

Apologising
58 Apologising to a person receiving unwanted mail
61 Apologising to a customer for a delay in supplying a product
62 Apologising for a missed appointment
63 Making a gentle apology to an established customer
65 Apologising for breaking a verbal assurance
66 Apologising to a customer for items that have not arrived

Appealing
130 Appealing to a customer’s sense of fair play to obtain payment

Appreciating (see also Congratulating; Thanking)
75 Responding to a letter of appreciation
180 Appreciating an employee’s special effort

Asking (see also Requesting)
33 Demanding that defective work be made good
99 Asking for an agency
111 Asking for more commission
133 Asking for payment in full – keeping up the pressure
148 Asking for a quotation from solicitors
151 Asking a candidate to attend an interview
158 Asking for a reference
200 Asking an insurance broker for a revised quotation
201 Asking for a quote to survey a property
205  Asking the bank to pay on the presentation of a letter of credit

**Cancelling (see also Terminating)**
192  Cancelling a cheque
194  Closing an account

**Chasing (see also Reminding)**
34   Non-delivery of goods – initial letter
35   Non-delivery of goods – second letter
126  Chasing up a commission payment

**Clarifying (see also Explaining)**
9    Placing an order and clarifying terms

**Complaining (see also Objecting)**
29   Gentle complaint to a good supplier – keeping him on his toes
30   Friendly complaint about repeated missing items
31   Complaining about repeatedly missing items
32   Complaining that the quality of service is deteriorating
37   Letter of complaint about the quality of a product
38   Complaining about a service that fell well below acceptable standards
39   Complaining that a verbal assurance has been broken
60   Replying to a complaint about poor service
69   Denying liability following a complaint
105  Complaining to an agent who is acting beyond his powers
141  Complaining about credit terms not being adhered to

**Confirming**
55   Confirming packing list details with an international customer
116  Confirming an advertisement to an agency
124  Requesting confirmation of when items will be paid for
152  Confirming an interview appointment
172  Confirming to an employee the termination of her employment
174  Confirming that an employee is not entitled to receive maternity pay
204  Confirming an offer to an estate agent

**Congratulating (see also Appreciating; Thanking)**
181  Congratulating the winner of a business award
Consoling
175  Wishing an employee a speedy recovery
186  Offering condolences to a bereaved wife
187  Offering condolences to the parents on the sudden loss of a son

Correcting (see also Amending)
27    Returning an incorrect consignment
47    Correcting a pricing error, informally
48    Correcting a pricing error
59    Notifying a customer that corrective action has been taken

Declining (see also Denying; Refusing)
98    Declining a distributor’s offer
102   Declining an agency but offering distribution
195   Declining an offer to open an account
213   Declining a request for a donation – pre-existing commitment
214   Declining a request for a donation – criterion not met
215   Declining a request to speak at a meeting
216   Declining a request to serve on a local committee

Denying (see also Declining; Refusing)
69    Denying liability following a complaint
70    Denying a potential breach of contract

Dismissing
108   Dismissing an agent for working for a competitor
164   Dismissing an employee (for breaching the safety code)
165   Summary dismissal

Disputing
13    Disputing a supplier’s terms and conditions
16    Disputing a carriage charge
40    Firm letter to a supplier over a dispute

Enclosing
143   Enclosing a copy of an invoice requested

Encouraging (see also Motivating)
96    Encouraging a customer to renew a subscription
Explaining (see also Clarifying)
22 Explaining why a new system is required
64 Explaining an apparent quality defect
107 Explaining why agency powers have been exceeded

Following up
97 Following up a meeting to solicit new business
196 Following up an application for a business loan

Giving
160 Giving a qualified reference

Handling
67 Handling a customer who is trying it on
68 Handling a very rude customer

Informing and telling (see also Notifying; Reporting)
23 Informing a supplier of changed terms and conditions
57 Telling a customer it’s too late to amend an order
95 Telling a story to grab attention
145 Informing a customer that a statement has already been paid
197 Informing a bank of your positive current position
198 Informing a bank of your deteriorating position

Instructing
202 Instructing a surveyor to inspect a property

Inviting
87 Inviting the customer to visualise
144 Rejecting an invitation to ‘contra’ invoices
210 Invitation to present an award at a ceremony
212 Accepting an invitation to speak at a meeting

Motivating (see also Encouraging)
104 Motivating an agent with an extra discount for higher sales
176 Motivating an employee whose performance has deteriorated
177 Using a promotion to motivate an employee
178 Motivating a team to achieve a goal
Negotiating

24 Negotiating a rate with a supplier
53 Playing one client off against another
73 Negotiating an amendment to an order
112 Negotiating a request for more commission

Notifying (see also Informing and telling; Reporting)

59 Notifying a customer that corrective action has been taken
113 Notifying an agent of revised prices
114 Notifying a distributor about a need for a surcharge
115 Friendly letter to the media about the loss of a key person
117 Note to an agency about the incorrect position of an advertisement
127 Notifying that an account is overdue and requesting payment
131 Notifying that an account is seriously overdue
136 Notifying a new trading account
137 Notifying a buyer about a discount for prompt payment
161 Resigning from a job
168 Notifying staff about the resignation of an employee
169 Notifying an employee of her entitlement to sick pay
171 Notifying an employee about a company loan
173 Notifying an employee of her entitlement to maternity pay
193 Notifying a bank about a change of signature for cheques

Objecting (see also Complaining)

218 Objecting to a planning application

Offering

98 Declining a distributor’s offer
119 Making a very low offer to advertise
157 Making an offer of employment
186 Offering condolences to a bereaved wife
187 Offering condolences to the parents on the sudden loss of a son
195 Declining an offer to open an account
203 Making an offer on a property to an estate agent
204 Confirming an offer to an estate agent
211 Offering support for a community venture

Opening

135 Opening an account for a customer
191 Opening a current account

**Outlining**
51 Responding to an international enquiry and outlining terms
92 Outlining services on offer

**Placing**
8 Placing an order and requesting delivery
9 Placing an order and clarifying terms

**Querying**
6 Querying a price
15 Querying invoices
54 Querying an order with a customer

**Quoting**
4 Friendly request for a quotation
5 Formal request for a quotation
45 Providing a quote, ex-works
46 Quoting and advising a potential customer
148 Asking for a quotation from solicitors
200 Asking an insurance broker for a revised quotation
201 Asking for a quote to survey a property

**Recommended**
109 Recommending that prices be reduced

**Refusing (see also Declining; Denying)**
7 Refusing a price change
72 Refusing to accept that a carriage charge be deducted
74 Refusing a customer a refund – outside the time period
118 Refusing one offer to advertise and accepting another
142 Writing off a debt and refusing to supply a company
170 Refusing to allow a leave of absence with pay

**Rejecting**
25 Turning down a supplier
144 Rejecting an invitation to ‘contra’ invoices
154 Rejecting a speculative job application
155 Rejecting a candidate after an interview
156  Rejecting a candidate who came very close to being appointed

**Reminding (see also Chasing)**
123  Gently reminding a customer about payment not received
125  Reminding a customer about credit terms and requesting payment
182  Reminding staff about the health and safety policy

**Replying (see also Responding)**
41   Stern reply to a negative response regarding a refund
60   Replying to a complaint about poor service
159  Replying to a request for a reference

**Reporting (see also Informing and telling; Notifying)**
183  Reporting a death to the Health and Safety Executive

**Reprimanding**
12   Ticking off a supplier for not sticking to the order
26   Firing a strong warning shot at a supplier
36   Getting a too-persistent sales representative off your back
106  Reprimanding an agent who is working for a competitor

**Requesting (see also Asking)**
4    Friendly request for a quotation
5    Formal request for a quotation
8    Placing an order and requesting delivery
14   Requesting a credit note – incorrect items received
17   Requesting a refund of delivery charges
18   Requesting further information about a product
19   Requesting consultancy information
52   Requesting an international client to issue a letter of credit
110  Responding to a request for lower prices
112  Negotiating a request for more commission
124  Requesting confirmation of when items will be paid for
125  Reminding a customer about credit terms and requesting payment
128  Requesting payment within seven days
129  Requesting more timely payment
132  Requesting payment from a company which seems to be going under
143  Enclosing a copy of an invoice requested
159  Replying to a request for a reference
199  Requesting insurance
209  Accepting a request for a donation
213  Declining a request for a donation – pre-existing commitment
214  Declining a request for a donation – criterion not met
215  Declining a request to speak at a meeting
216  Declining a request to serve on a local committee

**Responding (see also Replying)**
41   Stern reply to a negative response regarding a refund
51   Responding to an international enquiry and outlining terms
75   Responding to a letter of appreciation
89   Using a force-free trial to increase response
110  Responding to a request for lower prices
217  Responding to local residents about a potential disruption

**Returning**
27   Returning an incorrect consignment
28   Returning a non-conforming consignment

**Reviving**
82   Reawakening a business relationship
84   Using a customer-service exercise to revive a lapsed customer
96   Encouraging a customer to renew a subscription

**Seeking**
91   Seeking new business with a personalised letter

**Selling**
94   Selling on enthusiasm, immediacy and personal attention

**Sending**
139  Sending a proforma invoice
140  Sending a proforma invoice, due to a poor record of payment

**Surveying**
83   Surveying customer attitudes

**Terminating (see also Cancelling)**
172  Confirming to an employee the termination of her employment
Thanking (see also Appreciating; Congratulating)
76 Thank-you letter for hospitality
77 Thanking a satisfied customer
78 Thanking a good client, slightly cheekily
79 Thanking a business associate for a referral
103 Thanking an agent for obtaining some business

Using
84 Using a customer-service exercise to revive a lapsed customer
88 Using the lure of large potential gains
89 Using a force-free trial to increase response
90 Using curiosity to arouse interest
93 Using a testimonial to gain interest
177 Using a promotion to motivate an employee

Warning
26 Firing a strong warning shot at a supplier
162 First written warning to an employee (for breaching the safety code)
163 Final written warning to an employee (for breaching the safety code)

Welcoming
49 Welcoming a new customer, informally
50 Welcoming a new customer
A scan of the templates contained in this chapter shows the diversity of employee-related subjects that demand correspondence. Some of them are fairly straightforward, such as asking a candidate to attend an interview. Others, such as warnings and dismissal, and maternity templates, require more consideration to make sure the correct legal regulations are being adhered to satisfactorily. All of them need to be carefully drafted if they are not to be misinterpreted by the recipient. Some of the highlights are examined here.
References

Giving references can be awkward, because of the need to give a fair and honest reply which does not conceal relevant information. A failure to do this could expose you to a claim from either the prospective employer or the employee. Templates 145 and 146 show how to give a qualified reference.

Giving warnings

Templates 148–150 cover the tricky issue of giving appropriate warnings to an employee about his conduct, from first written warning through to dismissal.

Dismissal

Great care needs to be taken before dismissing someone without giving them a warning. Template 151 shows how to handle it for a case of gross misconduct. Remember, this letter may be used in evidence against you in an industrial tribunal.

Congratulations

Offering appropriate congratulations can sometimes be as awkward as writing a letter of condolence. Templates 165–167 show how you can write a sincere and well-phrased letter.

Condolences

For many people, a letter of condolence is one of the most difficult ones to write. But, at some time or other, most managers will have to face writing one. Templates 172–173 show how it can be done.
Offers of employment may vary from those that are highly detailed contracts, to those that contain the minimum of legally required information. A letter that contains all the details of a contract could appear intimidating to some employees and may even deter some candidates at the last minute. This letter allows the writer to adopt a friendlier but no-less-professional approach.

The points that need to be stated in a contract are: the position, the date of joining, the name of your employer, the salary, how frequently the salary is paid, when it will be reviewed, the normal hours of work, amount of holiday, rights to sick pay, pension arrangements, the period of notice that is required on either side and to whom the post reports.

You will want the employee to confirm his appointment in writing with you. Note how a duplicate copy is enclosed for the employee to sign and return, saving him the trouble of having to sit down and compose a letter.

Dear John,

Following our conversation this morning, I am delighted to confirm our offer of the job of Office Manager, with effect from Monday 25 February 2012.

I confirm that your annual salary will be £23,000, which will be paid monthly in arrears. Your salary will be reviewed after six months, in August. Thereafter, it will normally be reviewed annually in April.

The post reports to John Hibbert, our Managing Director. Our normal terms of employment will apply, as outlined on the attached sheet. We do operate a sick-pay scheme and although we do not have a company pension scheme, we give every help to anyone wishing to set up a personal scheme.

Your normal hours each week will be 9.00am to 5.00pm, Monday to Friday, with an hour’s break for lunch.

You will be entitled to 24 days’ holiday per year in addition to statutory holidays and the three days between Christmas and New Year. One month’s notice is required on either side, and the first three months are viewed as a mutual trial period.

Your employer, for contractual purposes, is H J Kingsley (Norwich) Ltd. Please sign the attached copy in acceptance of this offer.

Yours sincerely,

P J Cross
Personnel Manager

I accept the above offer of employment as set out in the above letter.

Signed .......................................... Date ..................................
When employing new staff, it is prudent to ask for a reference from their previous employer. This not only helps to verify that the candidate has worked where he says he did, but it also gives you an opportunity to find out more about him.

The questions asked here should enable you to find out how well he worked for and was judged by his previous employer.

Asking for two references from different people means you have a chance to spot any inconsistent replies, which could signal a need for further questions or enquiries.

---

Dear Mr Holmes,

We have received an application from John Hibbert for the position of Office Manager. I would be grateful if you could answer the questions below concerning John Hibbert’s employment with you.

1. What date did he join and leave your company?
2. What job(s) did he perform at your company?
3. How would you rate his timekeeping?
4. How much time in a year did he take off for sickness?
5. How many people was he supervising in his job with you?
6. Has any disciplinary action had to be taken against him, however minor?
7. Would you say he is a conscientious worker?
8. How would you rate his experience to perform the job for which he has applied?
9. Are there any reasons that you are aware of why we should not employ him?
10. What was his reason for leaving your company?

Thank you for your help with this matter.

Yours sincerely,

Sarah Milnes
Personnel Manager
If you are asked to give a reference, it must be given honestly and fairly.

When giving a reference, you are in a position of privilege that entitles you to say exactly what you think about a person, even if it might, in other circumstances, be defamatory. However, you must not say anything about the person maliciously, otherwise the position of privilege may be lost and you could face a claim from the employee.

Similarly, a failure to answer a question truthfully may expose you to a claim from the employer. This sense of having to walk a fine line often leads to referees giving fairly anodyne, non-judgemental references. It would, therefore, be a mistake to treat the answers to a reference as telling all there is to know about an employee. Nevertheless, it does give a worthwhile snapshot view and acts as a useful check.

Dear Ms Milnes,

Thank you for your request for a reference for John Hibbert.

I can confirm that John held the position of Office Assistant with us from June 2006 to April 2008. In April, he was appointed Office Manager and he stayed with us until December of the same year.

John's timekeeping was excellent and, although he had the occasional day off sick in a year, the amount was no more than one would expect. Most of the occasions were caused by seasonal bouts of 'flu.

In his post of Office Assistant, no one reported to John. However, in his role of Office Manager, he was responsible for managing a team of six personal assistants.

No disciplinary action has ever been taken against John and he is a very conscientious worker.

I am not aware of all the responsibilities that you are expecting him to perform, but, provided that they are broadly similar to those areas in which he has experience, I would say that he was well qualified to perform those tasks.

John told us he wished to leave because he was keen to work in a larger organisation, where there were greater opportunities for advancement and to learn more skills than we were realistically able to offer him.

I hope this gives you all the information you require, but if you do have any queries, please do not hesitate to contact me.

Yours sincerely,

Peter Holmes
Personnel Manager
If there has been an incident (a disciplinary offence, for example) that is asked about, you should not ignore it in a reference. Note how the letter seeks to put the offence into its true context – it was a one-off and his performance apart from that one time has been exemplary.

Don’t be afraid to state exactly how you interpret a particular question. Here, the former employer is unaware of all the responsibilities expected of the candidate in his new job, so note how the question is thrown back with the phrase ‘...provided appropriate training is made available to him...’, which cleverly leaves the new employer with the responsibility for making the judgement.

Dear Ms Milnes,

Thank you for your letter requesting a reference for John Hibbert.

I can confirm that John held the position of Office Assistant with us for just over three years, from June 2005 to Jan 2012.

John’s timekeeping was excellent and although he had the occasional day off sick in a year, the amount was no more than one would expect. Most of the occasions were caused by seasonal bouts of ‘flu.

Although John is a conscientious worker, he was disciplined on one occasion for taking an additional day’s holiday over and above his normal entitlement.

This incident was very much an exception and I have never had cause to complain about any other matter.

I am not aware of all the responsibilities that you are expecting him to perform, but, provided appropriate training is made available to him, I would say that John is now ready to build upon his current experience and take on more responsibility in his new appointment.

He has a very affable personality and the ability to work well in a team environment, especially where it is essential to get on with a number of different types of people. I have every confidence he will make a valuable contribution to your business and am therefore pleased to be able to support his application.

Yours sincerely,

Peter Holmes
Personnel Manager
147: Resigning from a job

A letter of resignation should be succinct and to the point. It is useful to specify the date that you intend to leave on to avoid any misunderstanding later. The second paragraph is not obligatory but helps set a friendly tone for the departure. It is always worth leaving on good terms. You never know when you may come into contact with the people for whom you work again, perhaps in other companies that you move to in the future.

Dear Mr Moore,

It is with regret that I tender my resignation as Assistant Export Manager.

This follows my appointment as Export Manager with Abtech. As I am required under my contract to give one month's notice, I understand my last day of employment will be 20 June 2012.

May I take this opportunity to thank you for all the invaluable help, advice and encouragement that you have given me during my three years with G B Grey. I have thoroughly enjoyed my time here, but I feel the moment is now right for me to take up new responsibilities and challenges.

Yours sincerely,

Peter King
Dear Mr Turner

Re: YOUR BREACH OF THE COMPANY’S SAFETY CODE

I confirm the points we discussed at our meeting on 12 July, concerning your negligence in adhering to the strict safety code we operate. The complaint was that on 12 July you did not wear a hard safety hat in the construction zone of the factory for a period of one hour, despite the fact that your manager had reprimanded you for not doing so a week earlier.

As we agreed, you must at all times adhere to the safety code of the company. I am reissuing a copy of the code to you and am asking your manager to go through it with you again, so you are quite clear about what is expected of you. If you are unclear about anything, however trivial it may seem, do not hesitate to ask. The safety code of the company is not operated for the benefit of the company but for the benefit of all our employees. You must understand that one employee’s breach of the code may endanger another employee’s life and it is for this reason that we enforce the policy strictly.

This is your first warning of a company rules violation. Future violations may lead to further disciplinary action being taken. You may appeal against this decision and if you wish to exercise this right, please notify me within seven working days.

Finally, please sign the enclosed copy of this letter to confirm that you have received this letter and another copy of the safety code and return the letter to me for my files.

Yours sincerely,

John Cooper
Director of Personnel

Note: Any disciplinary action must be carried out in accordance with the Acas Code of Practice: Disciplinary and Grievance Procedures.
WARNINGS AND DISMISSAL

149: Final written warning to an employee
(for breaching the safety code)

The final letter is much colder in its approach. It makes it clear to the employee what the consequences will be of failing to adhere to the safety standard. There is no attempt to persuade the employee to co-operate for his own and others' sake.

Note how the letter refers to specific dates, confirming the history in case the matter should come to a tribunal.

Note: Any disciplinary action must be carried out in accordance with the Acas Code of Practice: Disciplinary and Grievance Procedures.

Dear Mr Turner

Re: YOUR BREACH OF THE COMPANY’S SAFETY CODE

On 12 July, you breached the safety code by failing to wear a hard hat. On 15 September you were again discovered to have breached the code by not wearing the hard hat provided for you to use in the construction area of the factory.

It was made clear to you at the meeting on 12 July and in the letter to you of the same day that we expected you to follow the safety code strictly at all times. You have failed to do this.

For your own safety and for the safety of the others you must follow strictly all aspects of the safety code, especially wearing a hard hat in the zones required.

Due to this continued breach of the company’s safety rules this letter is confirmation that you have been issued with a final written warning.

There has not been a satisfactory improvement in your conduct since your last warnings. Accordingly, any continued violations of company policy or failure to conduct yourself according to the rules of the company shall result in further disciplinary action being taken, which may result in you being dismissed.

We remind you that you have the right of appeal against this warning according to the Terms and Conditions of Employment as supplied to you and if you wish to exercise this right, please notify me in writing within seven working days.

Please contact me if you have any questions.

Yours sincerely,

John Cooper
Director of Personnel
Dear Mr Turner

Re: YOUR BREACH OF THE COMPANY’S SAFETY CODE

I refer to our meeting on 27 October when we discussed the matter of how you were, for a third time, discovered not wearing a hard hat in the construction zone of the factory.

On 12 July and 15 September it was made clear to you that failure to wear a hard hat in a safety zone amounted to a breach of the company's safety code.

You were given a warning on 15 September that if you failed again to adhere to the company's safety code, you would be dismissed.

You have been given the opportunity to improve your conduct but have repeatedly ignored these warnings given to you. In the circumstances we have no option but to dismiss you with effect from 1 November. You will receive one month's pay in lieu of notice.

You are entitled to appeal against the company's decision to dismiss you and if you wish to exercise this right, please notify me in writing within seven days.

Yours sincerely,

John Cooper
Director of Personnel
WARNINGS AND DISMISSAL

151: Summary dismissal

A summary dismissal can be difficult to defend at an employment tribunal and a decision to dismiss instantly should not be taken lightly. If you do decide to dismiss, you must demonstrate that you have given the employee every opportunity to explain his conduct. A failure to do this may lead to a claim for unfair dismissal.

Note: Any disciplinary action must be carried out in accordance with the Acas Code of Practice: Disciplinary and Grievance Procedures.

Dear Mr Black,

I refer to our meeting on 12 June.

I regret to inform you that we are terminating your employment with immediate effect. This decision is based on an incident reported to me on 10 June by your supervisor, Paul Smith, and on the explanation given at the disciplinary meeting. The report recommended your dismissal because of your repeated intoxication during working hours.

As you are aware, the first reported incident of your intoxication on the job was on 21 May. That report was placed on your personnel file, and you were informed at that time that another incident would result in a disciplinary action or possible dismissal.

This second incident of intoxication adversely affected the operational efficiency and effectiveness of your department and threatened the safety of other employees and this amounts to an act of gross misconduct.

You are entitled to appeal against the company’s decision to dismiss you and if you wish to exercise this right, please notify me in writing within seven days.

Yours sincerely,

John Tome
Personnel Director