

WRITING ROADMAP

[ASSESSMENT: WRITING TASKS]

TASK 1 - CLIENT EMAIL requesting further data / requesting a meeting

Write an email to the client requesting further information.

SITUATION

You requested a list of data items from the client near the beginning of the project and the client has done a lot of work and spent a lot of time collecting and submitting all the data to you on time.

You need further evidence from the client by way of additional invoices, reconciliations and journals.

**Make up any additional information you need for it to make sense.*

***Financial Advisory: please adapt this Situation to something similar relevant to your roll, where you are likely to ask for more information.*

TIP: You might want to watch **Module 5 - Diplomacy and Striking the Right Tone** in the e-learning course.

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TASK 1 - CLIENT EMAIL requesting further data / requesting a meeting

CONTINUED

WRITING CRITERIA			
#	Criteria	Explanation	Example
1	Sign in	Sign in with a comma after their name.	Hi Veronika,
2	Greet	Greet your recipient by thanking them or acknowledging something about them you know in order to make a connection.	Thank you very much for sending over those files we requested by the agreed date.
3	Context	Provide context for more sensitive situations like this one. It's sensitive because you know they are not going to want to do more work on collecting data for you.	We have processed most of your data, but we explained earlier, we usually require additional documentation as evidence for meeting the standards.
4	Address need	Express your need quickly and succinctly.	I require further invoices from January 2020.
5	Explain	Provide a quick explanation why, if necessary.	before I can legally sign off on our requirements.
6	Time	Set time expectations.	Could you have this to us by [date]?
7	Next	What comes next?	The Recommendations Report will likely be finalised and with you by the end of the month, if you are able to get the information to me by then.
8	Service	Offer your service.	Let me know if you need any further information or assistance.
9	Good will	Remind them of your good intentions.	I'm always here to help.
10	Sign off	Sign off with a comma after it.	Kind regards, Waleed

WRITING ROADMAP

[ASSESSMENT: WRITING TASKS]

TASK 1 - CLIENT EMAIL requesting further data / requesting a meeting *CONTINUED*

GOOD WRITING SAMPLE

SUBJECT: Request for further evidence

Hi Veronika,

Thank you very much for sending over those files we requested by the agreed date.

We have processed most of your data, but as we explained earlier, we usually require additional documentation as evidence for meeting the standards.

I require further invoices from January 2020 before I can legally sign off on our requirements.

Could you have this to us by [date]?

The Recommendations Report will likely be finalised and with you by the end of the month, if you are able to get the information to me by [date].

Let me know if you need any further information or assistance. I'm always here to help.

Kind regards,
Waleed