Using Email to Communicate with Clients – more details

Check Email during your shift

1. To open Outlook email, see "Communicating with Clients through Email"

2. Click the ***Inbox*** to view the emails (These emails may, or may not, be resolved)

   To determine if the email was resolved, examine its icon
   (The icon = a small envelope to the left of the sender's name)

   (1) **No action as yet** = small envelope with closed flap

   (2) **Email Opened, but no obvious response** = small envelope with flap opened

> **Caution:** Before you respond to a previously opened email,
> check the Daily Log to determine whether other MGs answered the inquiry via phone or email.
> If via email, the response should be in Outlook's *Sent Folder*.

   (3) **Email Reply Sent** = small envelope w/arrow pointing to the left

   (4) **Email Reply Forwarded** = small envelope w/arrow pointing to the right

To read and respond to an email

a. Open the email with a double-click
b. Review the message
c. Verify that the email requires a response (See box, above)
   If the email requires action, do the needed research
d. To email a response, select the appropriate method from Guidelines A through E, below

> **Please don't delete any emails from the MG computer.**
> **(The reason: Weston wants to maintain an Email Archive as an educational tool)**

Guideline A:
Client Email → MG Email Response

1. To respond to an open email, click ***Reply*** on the toolbar near the top
   (Notice that the cursor will be just above the automatic signature)

   Note: Some client email is forwarded to MGs; to reply, see **Guideline B**

2. To respond, ensure the cursor is <u>above</u> the automatic signature, then type this information:
   a. Greeting (e.g.: Dear Joe; Dear Mrs. Smith)
   b. Brief re-statement of client's question
   c. Summary of your research and your response (ID, management, etc.)
   d. If appropriate, the URL of a suitable publication or an applicable image

3. Click ***Send***
   Note: ***Spell Check*** activates automatically; respond to the prompts as needed

4. **Record** the client contact in the Daily Log (See Tab B)
   (e.g.: Summarize client's question and MG response, including resources whenever possible)

Guideline B:

Forwarded Client Email → MG Email Response to the client

(Sometimes a client inquiry is forwarded to the MG office by Weston Miller or Jordis Yost)

1. To respond to the opened email, click ***Reply*** on the toolbar near the top
2. **Delete** the email address following ***To:***
3. **Copy** the client's email address from the forwarded email, and **paste** into the box following ***To:***
4. To type and send your response, set the cursor <u>above</u> the automatic signature, then follow steps 2-3 of **Guideline A**
5. **Record** the client contact in the Daily Log (See Tab B)
   (e.g.: Summarize client's question and MG response, including resources whenever possible)

Guideline C:

Client Email → MG Response by Phone → MG Email Follow-up w/Summary

Sometimes it's easiest to resolve an emailed question via phone. If so, also email a follow-up

1. To email a follow-up, complete steps 1, 2 and 3 in **Guideline A**,
   but begin your message similar to this: "This is to summarize our discussion…"
2. **Record** the client contact in the Daily Log (See Tab B)
   (e.g.: Summarize client's question and MG response, including resources whenever possible)

Guideline D:

Client Email with an Attachment (e.g. images or additional info) → MG Email Response

1. To email a follow-up, complete steps 1, 2 and 3 in **Guideline A**
2. **Record** the client contact in the Daily Log (See Tab B)
   (e.g.: Summarize client's question and your response, including resources whenever possible)
3. **Be certain to retain** both the client's original email and your shift's response.

Guideline E:

Client Phone Call → MG Email Response

1. To begin a new email, click ***New*** toward the left on top menu bar
2. Type client's email address in the box following ***To:***
3. Type a descriptive phrase in the box following ***Subject:***
4. Set the cursor just <u>above</u> the automatic signature in the message area
5. To type and send your response, follow steps 2-3 as in **Guideline A**
6. **Record** the client contact in the Daily Log (See Tab B)
   (e.g.: Summarize client's question and your response, including resources whenever possible)