| File name	Communication with client
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1   Introduction

This procedure is for every team member that has any kind of interaction with our clients, both potential or with clients that already purchased our product(s). The goal of this procedure is to give the guidelines on how you should communicate with clients.

2   Email

IT IS VERY IMPORTANT THAT PERSON WHO SENDS EMAILS TO A CLIENT HAS MS OUTLOOK INSTALLED.

DO NOT SEND EMAIL FROM GMAIL, YAHOO, etc.

Email for clients has to be created in MS Outlook in "Rich Text" or HTML format.
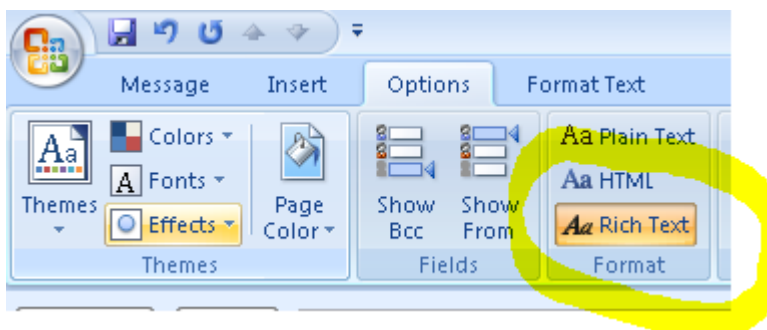
Before starting any kind of Email interaction with client, make sure that you have all the necessary requirements:

- – Company email address (name.surname@youtestme.com)
- – Outlook configured so it can send and receive Emails using your company email address
- – Company signature (if you don't know how to create one, ask some of your colleagues that already have it). Also, make sure that your signature has ID of the email template that you are using, for example:

Vanja Vukadinovic | Marketing and Sales Manager | YouTestMe
vanja.vukadinovic@youtestme.com
Phone: +1 647 5586 199
www.youtestme.com

youtestme
2511

Every email sent to the client has to include following in CC sales@youtestme.com

Once you have all of this, proceed to the next step, composing an email message – **use an existing email template** from the folder on SVN:

http://svn.mallocinc.com/youtestmedoc/trunk/Document Templates/E-mail templates/English/Sales
If there is no existing template for the email that you are sending, create one and verify with the team by sending the email template on *Slack – clients_communication* **before** sending it and saving it in the folder mentioned above. (unless it contains specialized/confidential information that should not be in SVN).

If it is not the first inquiry response to client and there already are some saved collaboration emails, then you must take the last email and choose **Reply All** in **Message** option from the Outlook main manu. In that way, the mail will be sent to everyone who was in charge of the previous email.

If there is an existing email template that is suitable for clients' requirements, click on that template (it will open in Outlook) and copy it to above email body. Don't forget to change red letters part in the template (for example – a client's name, text, etc.). Reread it one more time, and then press **Send**.

THIS IS THE ONLY WAY WE SEND EMAIL TO A CLIENT.

Since our intention is to have standardized emails, when creating a new email template use the existing ones as a guideline.

IMPORTANT:
Every email and document for clients has to be verified using:
1. standard spell and grammar checker built into Outlook or MS Word and
2. by using Grammarly (https://www.grammarly.com)
3. all important emails for clients, have to be sent to our lector Nada - nada.raskovic@thelanguageshop.rs

Here some rules on how you should begin email correspondence from an email etiquette point of view:

1. **One size does not fit all.** Use the salutation appropriate to the situation.
2. **Use "dear" in your initial correspondence with someone you have never met** and with whom you are trying to establish a business relationship.
3. **Use "hi" or "hello" once you have established a relationship**.
4. **Follow the lead of your client or customer.** If the other person always uses "dear", then so do you. If they begin their reply to you with "hi," then follow suit.
5. **Use a salutation of some form.** There is always enough time to be courteous.
6. **Along with your greeting include the person's name.** However, never use anyone's first name in business until they give you permission. When a client salutes you with your first name, it is the moment for you to do the same in the next email.
7. **With friends you may be as informal as you like.**

2.1.1 Problem with sending email

If happens that our email cannot be delivered to the client (it bounces back), first you should try to send an email from another account. If that doesn't work you should find another polite way to communicate with the client. Inform them that we have received an invalid email and ask if they could send us another one.

For example, find the client on LinkedIn, or contact them through the official email on their website.

2.1.2 Inquiry Response

When a client addresses to us a mail asking questions about the products, we first need to check if we already have the answer to these question in the FAQ.
You can fin the FAQ list following this link: SVN\youtestmedoc\Trunk\Sales\Documentation for clients

Once you have found the appropriate answer, you need to copy-paste it in the mail that will be send to the client.

In case that we don't have the answer to the questions in the FAQ, we need to organize the team for a brainstorming on Slack, asking politely for information about the topic on *marketing_sales*.

2.1.3 Email Attachments

YTM standard documents like marketing material and manuals should **<u>NOT</u>** be sent as attachments in emails to clients.
Instead we should send **links** to the documents to be downloaded. The reasons are:
1. this way emails can be made from template much faster and easier since we don't need to think and search for documents
2. we can edit document even after we send email to the client (last minute changes)
3. we overcome problem of attachments that are too large
4. the whole cycle of preparing email and sending it is much faster

It is best that documents being sent are on Wiki site or YTM web site. Documents on Wiki site are regularly synchronized with SVN.

Links to documents should be part of standard emails.

2.1.4 Forwarding emails with 1&1 webmail (user view)

When someone from the company leaves to a vacation or makes sick leave for a couple of days, couple of things needs to be done.
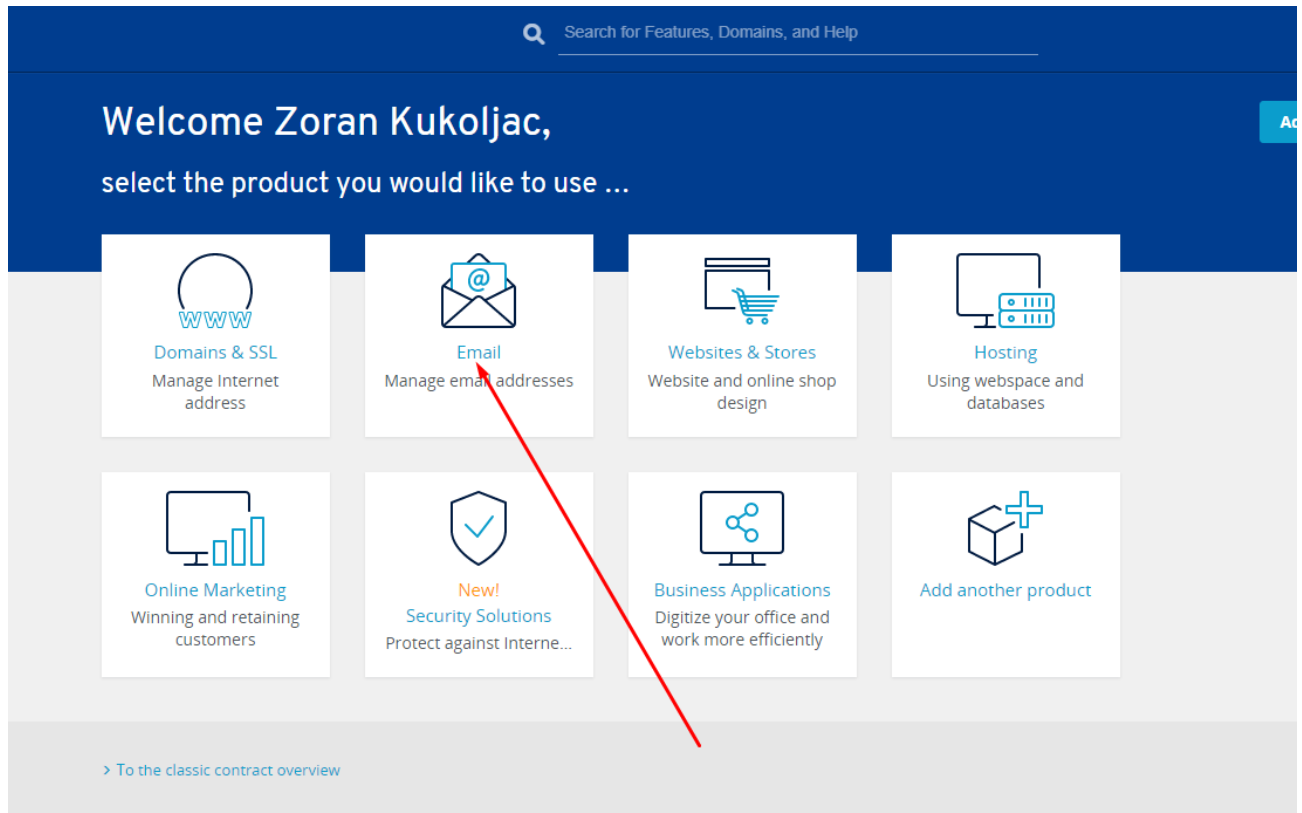
a) Create autoresponder from your 1&1 webmail
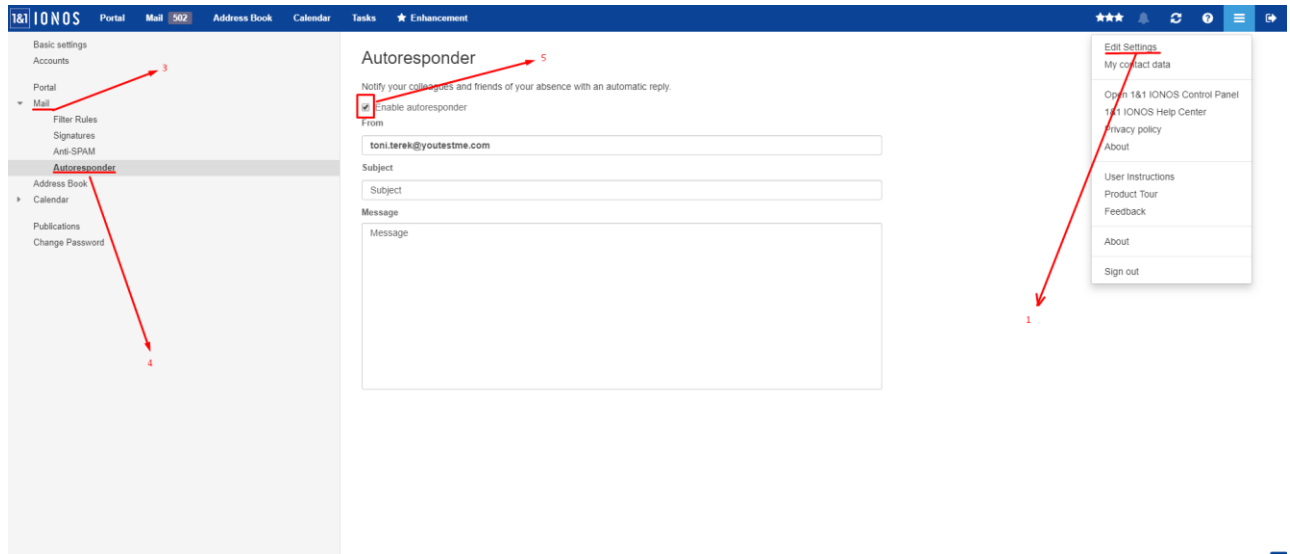
b) Inform your 1&1 manager to forward your emails to your manager and people from your department

2.1.5 Forwarding emails with 1&1 webmail (admin view)

Below are screenshots on how to edit someone's auto response if the person is on vacation and forgot to set his auto response or it has some kind of mistake.
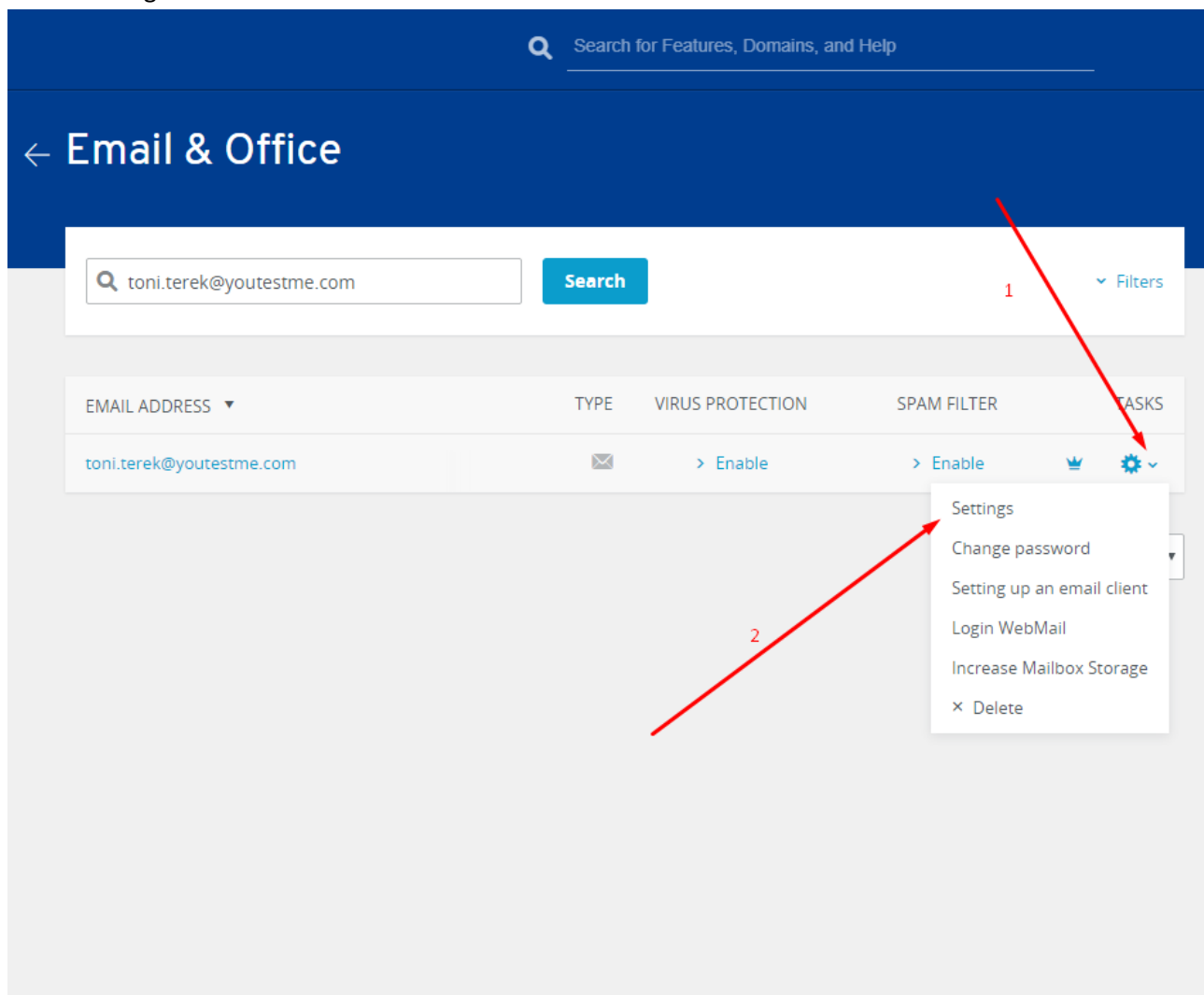
a) When you log in to administrator account, click on the Email icon

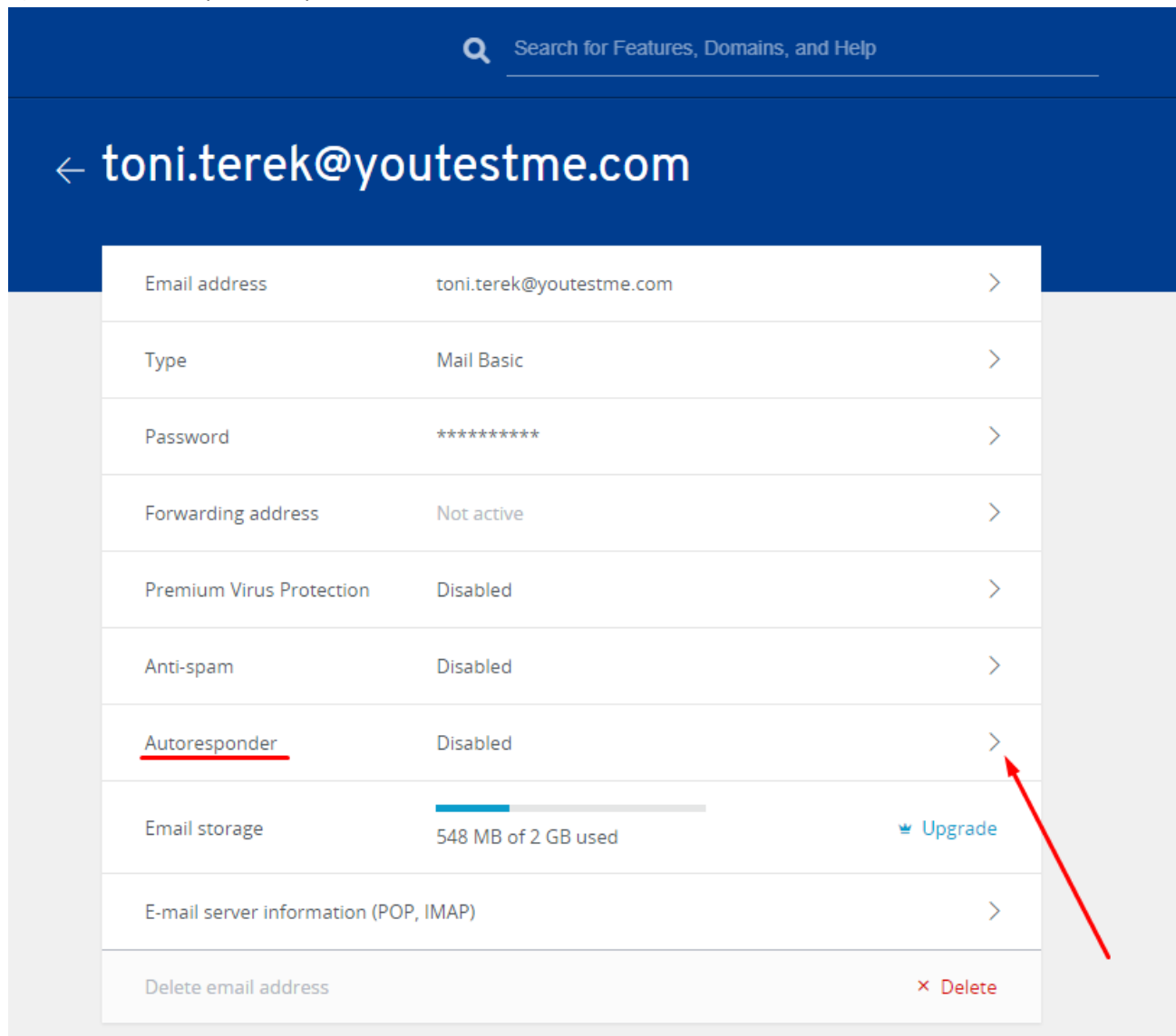b) Type down the person's name, click on the search button
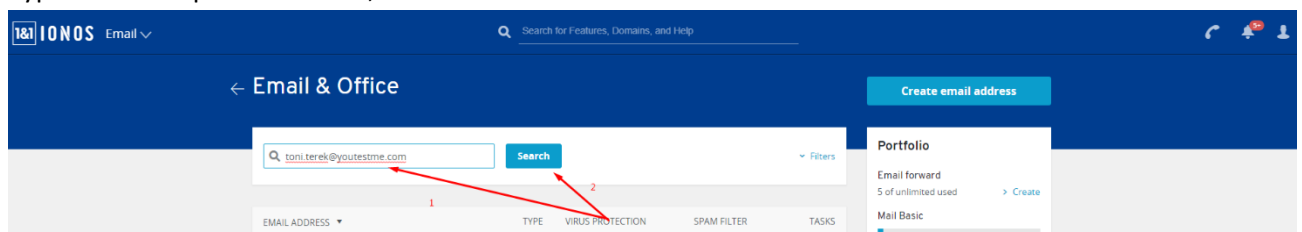
c) Select settings button

d)   Select autoresponder option

e)   Turn on the autoresponder, type in (Subject, From and Message), select save

3   Documents for Clients

Documents for clients have to be created in MS Word using one of the standard document templates located in:
\youtestmedoc\Document Templates\

Documents for clients **should have a cover page** (use document template with cover page).
For each new document always use the newest template since they can change at any time.

Always follow the best practices described in this document:

\youtestmedoc\Procedures\Technical Procedures\YTM MS Word Best Practices.docx

If a client is not expected to edit the document then it should be sent in PDF format.

4 Communicating with clients using WebEx

Before the meeting:
1. Several hours before the WebEx Meeting check all equipment you need – microphones, speakers, etc.
2. One hour before the meeting make a test connection with somebody to make sure that sound and microphone is working fine.
3. YTM team should log in to the meeting 15 minutes before the meeting and ensure all is functioning properly before client joins.

During the meeting:
1. Instruct participants to put their microphones on "mute" if they are just listening. That way we can eliminate background noise from participants.

Webex manual for YTM employees:
\youtestmedoc\Procedures\Technical Procedures\How to Use WebEx for Employees.docx

Webex manual for YTM clients:
\youtestmedoc\Procedures\Technical Procedures\YouTestMe WebEx Instructions.pdf