WORKSHEET 04 / TO COMPLETE

Preparing a request

Prepare the conversation, then keep a record of the reply.

Print and write at your own pace, or copy these headings into a notebook.

Who to contact / why / through which channel?

Relevant facts: period, amounts and any reference

My request and the important date

Afterwards: date, contact, reply and confirmation

Next step / follow-up date

Send only relevant documents through a verified channel. Never send a password. A request sent is not an agreement obtained.