

# **POLICYHOLDER BUSINESS LETTER**

By: Darin L. Price  
For: CTE 612: Studies in Technology (Educators in Industry)  
Due: August 4, 2003

**Project Description:** Insurance companies, insurance agencies, and businesses in general have to write business letters for several different reasons. The lesson is to learn how to properly format a business letter and use Microsoft Word to write a business letter to a policyholder explaining the coverage or non-coverage of a claim.

**Time:** Covers three to four instructional class periods.

**Grade Level:** 7<sup>th</sup>-9<sup>th</sup> grade

**Prerequisites for Lesson:** Keyboarding skills, knowledge of basic Microsoft Word commands (spellchecking, saving, printing, and opening files)

**Student Objectives:** Upon completion of this lesson, a student should be able to:

1. Identify who uses business letters
2. Identify the parts of a business letter
3. Identify the number of times the enter key is hit after each part
4. Identify a Block Format style of business letter
5. Properly type and format a business letter

**Required Materials:** Computers and Microsoft Word (any word processing application will work) are the necessary equipment and software. Students will be given notes on formatting a business letter.

**Instructions:** This lesson will take three to four instructional class periods. The time it takes for each part of instruction may vary.

## **Part I-Instruction**

**Review (Anticipatory set):** What type of letters can a person write?

**Overview:** We are going to learn who uses business letters, why they are used, how to properly identify the parts of a business letter, and how to properly format a block format business letter.

### **Presentation:**

1. Hand out the Student Business Letter Example and Note Sheet.
2. Go over each specific part (a student copy and teacher copy is provided after this section)
  - \*Go over the name of each part (have students fill in the blanks as you go over each part)
  - \*Go over how many times enter is hit after each part (have students fill in the blanks as you go over each part)
3. Make sure to explain and go over any additional formatting (have students fill in the blanks at the bottom of the Student Business Letter Example and Note Sheet)
  - \*Salutation is Dear "Title" Last Name
  - \*Block Format-everything is left aligned
  - \*Body of letter: single-spaced, a blank line in between each paragraph
  - \*Punctuation used: after the salutation is a colon (:) and after the closing is a comma (,)
4. Check for understanding periodically by asking specific questions about business letters

# STUDENT BUSINESS LETTER EXAMPLE AND NOTE SHEET

Name: \_\_\_\_\_

Hour: \_\_\_\_\_

September 14, 200 ← Date spelled out  
800 Elm St.  
Kalamazoo MI, 49009

\_\_\_\_\_

\_\_\_\_\_

Mr. Lance Austin  
521 Oak St.  
Otsego MI, 49078

\_\_\_\_\_

Dear Mr. Austin:

\_\_\_\_\_

We are covering how to format a business letter. Business letter is formal letter. The parts of a business letter in order are the date, return address, inside address, salutation, body, closing, writer of letter signed name, and writer of letter typed name.

This letter is your guide to help you understand and correctly format a business letter. Make sure the date is spelled out. The salutation of a business letter starts with the word Dear. After Dear, the person's title is next and then the last name. You should also notice that in the body of a business letter, the beginning of each paragraph is NOT indented and is why a blank line is needed in between each paragraph. This business letter format is called BLOCK FORMAT. Notice the body of a business letter is always single-spaced.

Make sure to pay attention to the formatting of a business letter because you will have an assignment requiring you to type up a correctly formatted business letter and be quizzed on the different parts and spacing involved. On the provided lines, label each part of a business letter and the number of times enter is hit after each part.

\_\_\_\_\_

Sincerely,

\_\_\_\_\_

\_\_\_\_\_

Darin L. Price

\_\_\_\_\_

BODY OF LETTER: 1. \_\_\_\_\_ 2. \_\_\_\_\_

BLOCK FORMAT:

PUNCTUATION AFTER SALUTATION \_\_\_\_ PUNCTUATION AFTER CLOSING \_\_\_\_

# STUDENT BUSINESS LETTER EXAMPLE AND NOTE SHEET

## (Teacher Key)

September 14, 2003 ← Date spelled out  
800 Elm St.  
Kalamazoo MI, 49009

Date (1 enter)

Return Address (4 enters)

Mr. Lance Austin  
521 Oak St.  
Otsego MI, 49078

Inside Address (2 enters)

Dear Mr. Austin:

Salutation (2 enters)

We are covering how to format a business letter. Business letter is formal letter. The parts of a business letter in order are the date, return address, inside address, salutation, body, closing, writer of letter's signed name, and writer of letter's typed name.

This letter is your guide to help you understand and correctly format a business letter. Make sure the date is spelled out. The salutation of a business letter starts with the word Dear. After Dear, the person's title is next and then the last name. You should notice that in the body of a business letter, the beginning of each paragraph is NOT indented and is why a blank line is needed in between each paragraph. This business letter format is called BLOCK FORMAT. Notice the body of a business letter is always single-spaced.

Make sure to pay attention to the formatting of a business letter because you will have an assignment requiring you to type up a correctly formatted business letter and be quizzed on the different parts and spacing involved. On the provided lines, label each part of a business letter and the number of times enter is hit after each part.

Body (2 enters)

Sincerely,

Closing (4 enters)

Writer of letter's signed name

Darin L. Price

Writer of letter's typed name

BODY OF LETTER: 1. Single-spaced 2. 2 enters at the end of each paragraph

BLOCK FORMAT: Everything is left aligned; no indenting

PUNCTUATION AFTER SALUTATION: : (colon)

PUNCTUATION AFTER CLOSING: , (comma)

**Exercise:** Have students go into Microsoft Word and create a new word document for this activity. The following are the direction for the students to follow as the instructor supervises, observes, and provide assistance. Have the students, as much a possible, use their Student Business Letter Example and Note Sheet to allow them to complete the exercise.

## **BUSINESS LETTER EXAMPLE** **(On the Computer)**

1. Create a new document in Microsoft Word
2. Use your business letter notes to correctly format the example business letter.
3. Make sure spacing of body is correct
4. Make sure to use appropriate spacing after each part
5. Type the following body of a business letter

The Otsego Middle School PTA is devoting its next meeting to the important topic “Computer Literacy”. The meeting is on November 18, 2003 and begins at 7:00 p.m.

Our speaker will be Dr. Greg Rutten. For the past several years, he has written the “Personal Computer” column in the Grand Rapids Tribune. His talk will combine wisdom and wit.

To assure Dr. Rutten a large audience, we are asking several members to bring two additional non-members as guests. Please use the enclosed return card to give me the names of those attending by November 1, 2003.

6. Put the appropriate information where it belongs in the letter.

Return Address	2274 Cogswell Road Otsego MI, 49078
Date	October 12, 2003
Salutation	The letter is going to Mrs. Wiggins
Inside Address	Mrs. Alice Wiggins 1300 IBM Avenue Kalamazoo MI, 49009
Closing	Cordially yours
Writer of Letter	Your Name

7. Spellcheck
8. Save the document as BUSINESS LETTER EXAMPLE
9. You could have them print it if you wanted to grade it and/or give points/credit

The following is the finished Business Letter Example with proper formatting. This is available for the teacher to use.

October 12, 2003  
2274 Cogswell Road  
Otsego MI, 49078

Mrs. Alice Wiggins  
1300 IBM Avenue  
Kalamazoo MI, 49009

Dear Mrs. Wiggins:

The Otsego Middle School PTA is devoting its next meeting to the important topic “Computer Literacy”. The meeting is on November 18, 2003 and begins at 7:00 p.m.

Our speaker will be Dr. Greg Rutten. For the past several years, he has written the “Personal Computer” column in the Grand Rapids Tribune. His talk will combine wisdom and wit.

To assure Dr. Rutten a large audience, we are asking several members to bring two additional non-members as guests. Please use the enclosed return card to give me the names of those attending by November 1, 2003.

Cordially yours,

Darin L. Price

**Summary:** Have students write down two things they learned about a business letter. Collect or go over as a class. Summarize with the students why business letters are used, the parts of a business letter, the number of spaces after each part, what block format means, and the punctuation used. This can be done as they look at the example business letter that they type up in the exercise above

## **Part II-Instruction**

**Review:** Review Part I-Instruction. Students will need reviewing on the parts of a business letter, where they go, and additional specific formatting of a business letter. **Anticipatory Set:** Why would insurance companies and/or agencies need to write and send a business letter or who would insurance companies and/or agencies write or send a business letter to?

**Overview:** Students are going to use their knowledge and understanding of formatting a business letter to create a business letter that will be written and sent to a n insurance policyholder.

**Presentation and Exercise:** Students are going to write and properly format a business letter. They are going to write a letter to a present policyholder telling them that a claim for their homeowner's coverage is denied. A stereo was damaged, but it was damaged by a non-covered peril.

1. Create a new word document
2. Type a business letter to Roger Clemens telling him that his claim is denied for his damaged stereo. You work for MLB Insurance.
3. Roger Clemens lives at 234 Baseball Lane in Plainwell, MI, 49080
4. Use block format and make sure you have all of the parts included in the letter.
5. Use today's date for the letter
6. Double check correct number of enters after each part of the business letter
7. Make sure the letter is formatted appropriately
8. You must have at least two paragraphs. Each paragraph must have at least three sentences. The first paragraph should inform the policyholder that the claim is denied and why. The second paragraph should show appreciation for continued business.

9. Use appropriate grammar in sentences.
10. Spellcheck when you are finished
11. Save the document as Policyholder Business Letter
12. Print out your business letter, make sure to sign it, and turn it in.

**Summary:** Summarize the importance of business letters. Business letters are formal letters written by business people and/or for business people. Letters of inquiry, applications for work or school, resumes, and cover letters are other possible letters that students may need to format and write.

The following is an example of a correctly formatted policyholder business letter for the instructor to use as a grading guide. Also a grading assessment for the letter is provided.

July 25, 2003  
512 Muriel St.  
Otsego MI, 49078

Today's date and spelled out (1 enter)

Return Address (4 enters)

Mr. Roger Clemens  
234 Baseball Lane  
Plainwell MI, 49080

Inside Address (2 enters)

Dear Mr. Clemens:

Salutation (2 enters)

I am sorry to inform you that your claim for the damaged stereo has been denied. The damage to the stereo was caused by a non-covered peril. Fortunately the stereo was the only thing damaged. (2 enters)

MLB Insurance appreciates you as a customer. We hope to continue providing you with quality and prompt service. If you have any questions please call the office. (2 enters)

Sincerely,

Closing (4 enters)

Writer's Signature

Darin L. Price

Writer's typed name

**POLICYHOLDER BUSINESS LETTER**  
(Grading Assessment)

**Student:** \_\_\_\_\_

**Hour:** \_\_\_\_\_

**Date** (none=0, not spelled out=1/2, spelled out=1) \_\_\_\_\_ (1 pt. possible)

**Return Address** (correct=0, incorrect=1) \_\_\_\_\_ (1 pt. possible)

**Inside Address** (no Mr.=0, with Mr.=1/2) \_\_\_\_\_ (1/2 pt. possible)

**Inside Address** (incorrect=0, correct=1) \_\_\_\_\_ (1 pt. possible)

**Salutation** (incorrect=0, correct=1) \_\_\_\_\_ (1 pt. possible)

**Salutation** (no colon=0, colon used=1/2) \_\_\_\_\_ (1/2 pt. possible)

**Body**

**1<sup>st</sup> paragraph** (1 sentence=1/2, 2 sent.=1, 3 sent.=1 1/2) \_\_\_\_\_ (1 1/2 pts. possible)

**2<sup>nd</sup> paragraph** (1 sentence=1/2, 2 sent.=1, 3 sent.=1 1/2) \_\_\_\_\_ (1 1/2 pts. possible)

**Single Spaced** (no=0, yes=1) \_\_\_\_\_ (1 pt. possible)

**Proper enters after each part** (No=0, Yes=1/2)

**Date** (1 enter) \_\_\_\_\_ (1/2 pt. possible)

**Return Address** (4 enters) \_\_\_\_\_ (1/2 pt. possible)

**Inside Address** (2 enters) \_\_\_\_\_ (1/2 pt. possible)

**Salutation** (2 enters) \_\_\_\_\_ (1/2 pt. possible)

**Body-between paragraphs** (2 enters) \_\_\_\_\_ (1/2 pt. possible)

**Body-end of body** (2 enters) \_\_\_\_\_ (1/2 pt. possible)

**Closing** (4 enters) \_\_\_\_\_ (1/2 pt. possible)

**Closing** (incorrect=0, correct=1) \_\_\_\_\_ (1 pt. possible)

**Closing punctuation** (no comma=0, comma used=1/2) \_\_\_\_\_ (1/2 pt. possible)

**Writer's typed name** (no=0, yes=1) \_\_\_\_\_ (1 pt. possible)

**Writer's signed name** (no=0, yes=1) \_\_\_\_\_ (1 pt. possible)

**Block format** (no=0, yes=2) \_\_\_\_\_ (2 pts. possible)

**Spellcheck** (no=0, yes=2) \_\_\_\_\_ (2 pts. possible)

**Total Score** \_\_\_\_\_/20

### **Part III-Instruction**

***Review:*** Review the Policyholder Business Letter assignment with the students. Review all of the parts, number of enters after each part, block formatting, and punctuation after salutation and closing.

***Overview:*** Students are going to take a business letter quiz to show their understanding of the parts and formatting of a business letter.

***Presentation and Exercise:*** Hand out the business letter quiz and have students take it. The quiz and answer key are provided below.

***Summary:*** Grade the quiz as a class and summarize what the students learned about business letters.

# BUSINESS LETTER QUIZ

Name: \_\_\_\_\_

Hour \_\_\_\_\_

**Directions:** Please label the business letter below, by using the words that are provided below.

August 25, 2003  
734 Farmer St.  
Otsego, MI 49078

A. \_\_\_\_\_

B. \_\_\_\_\_

Mr. Tim Jones  
Burger King Manager  
538 M-89  
Otsego, MI 49078

C. \_\_\_\_\_

Dear Mr. Jones:

D. \_\_\_\_\_

My name is Darin Price, and I am writing to let you know that I was not impressed or happy with the drive through service I received on July 27, 2003. It took nearly 20 minutes for me to get my order, and the employee was rude and had a problem with having to get me catsup for my french fries.

In the future, it might be important to remind your employees that their job is to make the customer happy. Thank you for your time.

Sincerely,

E. \_\_\_\_\_

F. \_\_\_\_\_

Darin L. Price

**Return  
Address**

**Closing**

**Signature**

**Inside  
Address**

**Salutation**

**Date**

**Directions:** Answer the following questions with space provided.

1. What does block formatting mean?
2. What is important about the date when it is typed up in a business letter?
3. Who's address does the inside address belong to?
4. Does the business letter at the top of this quiz use the correct punctuation after the closing and salutation? (circle one)

Yes

No

5. How many times is enter hit after each of the following business letter parts  
(Circle your answer)

After the Date	1	2	3	4
After the Inside Address	1	2	3	4
After the Salutation	1	2	3	4
After the Closing	1	2	3	4

## **BUSINESS LETTER QUIZ**

**(Answer Key and Points)**

The entire quiz is worth 20 points.

**Business Letter** (each correct answer for this area is 2 points—12 points total)

- A. Date
- B. Return Address
- C. Inside Address
- D. Salutation
- E. Closing
- F. Signature

**Questions** (each correct answer to the questions is 1 point each---8 points total)

1. Block formatting means everything is left aligned or no indenting.
2. The date must be spelled out (i.e. August 14, 2003 not 8/14/03)
3. The person the letter is sent to.
4. Yes the punctuation is correct
5. After the Date-1 enter  
After the Inside Address-2 enters  
After the Salutation-2 enters  
After the Closing-4 enters