Client-Ready PM

FREE PRACTICE SHEET

A Client Says It Was Approved. It Was Not. Say This

A client says a decision was approved last week, and your notes say it was not

PRACTICE THESE LINES

Read each sentence aloud, in order. When you reach the end, read the whole email once more, start to finish.

Thanks for flagging that.

Let's make sure we are aligned.

My notes from last week show we sent three tile options for review, but we do not have a confirmed selection yet.

There are two options.

Option A, we lock the finish on this call.

Option B, I send you the three options again after the call, for your team to review.

I recommend we lock the finish on this call, so the order goes out this week.

Another review round would delay the order.

Once the finish is confirmed, I will email it to everyone on this call.

If anything looks different, please tell me by Thursday, so the order still goes out this week.

MAKE IT YOURS

Now say it about your own project. Fill each blank with your details.

how you open without arguing . _turn "you are wrong" into "let's check together"_ .

the record, from your notes . _offer two options, so the decision stays with the client_ .

option A, decide now . _option B, review again later_ . _your recommendation and its reason_ .

the cost of the other option . _what happens next_ . _the ask, one date and its reason_ .

Read the full script. Scan the code, or go to https://clientreadypm.com/t/47

Watch on YouTube. https://www.youtube.com/watch?v=SjuG7Lh_Y54

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KEY PHRASES

“Let's make sure we are aligned”
Turns "you are wrong" into "let's check together".

“My notes from last week show”
States the record as your notes, not as the client's mistake.

“There are two options”
Keeps the decision with the client.

“I recommend we lock”
Turns the correction into a decision.

“please tell me by Thursday”
Gives one clear date.

ONE CARD TO KEEP

Before You Hit Send

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Four lines, in this order, every time.

1 FACTS	What happened, in one sentence. No blame and no apology.
2 OPTIONS	Two ways forward. Call them A and B so the client can answer with a letter.
3 RECOMMENDATION	Say which one you would choose, and give the reason in one clause.
4 NEXT STEP	Who does what, and by when. Put a date on it and put yourself in it.

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