Client-Ready PM

FREE PRACTICE SHEET

Behind Schedule and the Client Needs to Know: What to Send Before the Permit Slips

A vendor misses a milestone

PRACTICE THESE LINES

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

On today's coordination call, our structural engineering firm told us the structural submittal will be three days late, due to time allocated to an additional independent check of the calculations.

Accurate calculations protect the whole project, and we can likely recover the three days elsewhere in the permitting process.

We can submit the permit package Thursday as planned without the structural sheets, or hold it and submit the complete package next Tuesday.

I recommend holding it, because an incomplete package usually brings agency comment rounds and resubmittal fees, and each review can take a month or more.

Please let me know which you prefer by Wednesday, so we have time to prepare Thursday's submittal if you choose that option.

If I have not heard from you by then, I will hold the package and submit the complete package next Tuesday.

Going forward, our team and the firm are building this additional check into the schedule for every remaining structural submittal.

MAKE IT YOURS

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

FACTS

On today's coordination call, _who is late_ told us _what is late_ will be _how late_ late, due to _why it is late, in your words_. Accurate calculations protect the whole project, and we can likely recover _the time you can recover_ _where you can recover it_.

Read the full script. Scan the code, or go to https://clientreadypm.com/t/22

Watch on YouTube. https://www.youtube.com/watch?v=O1dqcLIZvnQ

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OPTIONS

We can submit *what you submit, and the planned day* as planned *what option one leaves out*, or hold it and submit *the complete option, and the new day*.

RECOMMENDATION

I recommend holding it, because *the cost of the other option*, and each review can take a month or more.

NEXT STEP

Please let me know which you prefer by *your reply deadline*, so we have time to *what you need time to do* *when you need that time*. If I have not heard from you by then, I will *what you will do if there is no reply*. Going forward, our team and the firm are *what changes for every later submittal*.

KEY PHRASES

"we can likely recover"
Says you expect to win the time back without promising it.

"I recommend holding it, because"
Gives your advice and the reason in the same sentence.

"Please let me know which you prefer by"
Asks for the client's choice with a real day.

"If I have not heard from you by then"
Says what happens next without sounding like a threat.

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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