Client-Ready PM

FREE PRACTICE SHEET

Client Got the Facts Wrong in the Meeting? What to Say

The client says a decision was approved, and 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.

FACTS

a thank you for what the client raised . _how you invite a shared check_ .

what your notes show, and what is still missing .

OPTIONS

how many choices you offer . _the first choice you offer_ .

the second choice you offer, and who does what .

RECOMMENDATION

the choice you recommend, and what it lets you do this week .

what the other option costs .

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NEXT STEP

what you will send, and to whom . *the date to flag a difference, with its reason* .

KEY PHRASES

“Thanks for flagging that”
Gives you a second and shows the room you are on the client's side.

“Let's make sure we are aligned”
Turns a disagreement into a check you do together.

“My notes from last week show”
Names what the notes say, not what the client remembers.

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

“please tell me by Thursday”
Gives one date, with its reason, for a difference to be flagged.

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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