Client-Ready PM

FREE PRACTICE SHEET

Client Thought It Was in the Base Fee? Say This

A client believes final photo documentation was in the base fee, and you correct it with two options

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 raising this.

Our signed scope lists progress photos and inspection reports.

They record the work as it happens.

It does not include a final documentation set of existing conditions.

That set is a separate, complete record.

Two options.

Add the documentation now as a small fixed-fee item, so the record is complete before the next phase starts.

Or leave the existing-conditions record as it stands, without the added documentation.

I recommend a fixed-fee change order for the documentation, for your review and approval.

Which would you prefer?

Let me know by Thursday, so a change order can be approved before the next phase starts.

MAKE IT YOURS

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

thank them _____

what the signed scope covers _____ *what it does not cover* _____

option one, with its reason _____ *option two* _____

your recommendation _____

the ask, one date and its reason _____

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KEY PHRASES

“Thanks for raising this”
Thanks the client before the correction.

“Our signed scope lists”
States what was agreed in writing.

“Which would you prefer?”
Asks the client a real question.

“Let me know by Thursday”
Asks for one answer by one date, with its reason.

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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