Client-Ready PM

FREE PRACTICE SHEET

Client Raised Their Voice Twice? Tell Your Manager

A client has raised their voice on calls twice, you tried privately first, and you tell your manager

PRACTICE THESE LINES

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

You tried to resolve this privately with the client first and that was the right first step.

Now a second person can help.

Telling your manager isn't the same as asking your manager to fix the client.

You keep ownership of the project.

Your manager helps you repair the client relationship.

You'll send one short email with dates and clear asks.

The groundwork is done.

The two calls have dated notes.

The forecast was rechecked and the figures are correct.

After each call, you spoke with the client privately about their concerns.

The behavior continued.

I recommend that you contact the client personally and privately before Thursday's call so you can understand the client's concerns and point of view.

MAKE IT YOURS

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

why now, and what you already tried

what you keep and what your manager does

what you send and what is ready *what you already checked and tried*

what happened after

your recommendation, with its date and reason

Read the full script. Scan the code, or go to https://clientreadypm.com/t/57

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KEY PHRASES

“You keep ownership of the project”
Says your manager helps and you stay in charge.

“The groundwork is done”
Says the facts are ready before you ask.

“I recommend that you”
Gives your recommendation to your manager.

“Now a second person can help”
Gives the reason to bring your manager in.

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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