Client-Ready PM

FREE PRACTICE SHEET

Cost Overrun: What to Tell the Client First

The project is over budget and the client has not seen the number

PRACTICE THESE LINES

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

Our latest numbers put the project 6%, or $84,000, above the agreed cap in our contract.

The cause is increased structural steel costs.

I see two options.

Option A.

We send a change order for the full $84,000.

Option B.

We switch two finishes in back-of-house areas to lower-cost ones and move the landscaping package to a later phase.

Together these save $52,000, and a change order covers the remaining $32,000.

We can also send you similar finish recommendations that are in stock.

I recommend option B, because it brings the change order down to $32,000 and keeps the rest of the project as designed.

Please reply A or B by Thursday, so the change order goes out with the next invoice.

MAKE IT YOURS

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

the number and the cap *the one cause*

how many choices you give

Option A.

option A, and the amount

Option B.

option B, what changes

what option B saves and what is left *an extra offer that helps the client choose* I recommend option B, because *your recommendation and its reason* . *the ask, the date and the reason*

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KEY PHRASES

“Our latest numbers put the project”
Opens with the number, before any explanation.

“The cause is”
Names one cause in a short sentence.

“I see two options”
Tells the client they will choose between two clear paths.

“I recommend option B”
Gives your own choice, so the client does not have to guess.

“Please reply A or B by”
Asks for one letter and gives the date.

ONE CARD TO KEEP

Before You Hit Send — **Client-Ready PM**

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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