Client-Ready PM

FREE PRACTICE SHEET

Nothing Moved After the Call? Send This Meeting Recap

A coordination call ends with a fix agreed and nothing written down, and you send the recap yourself

PRACTICE THESE LINES

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

To confirm we are on the same page and can meet our dates, here is a recap of today's coordination call.

We reviewed the ductwork clash on level three and agreed on a fix before it reaches fabrication.

Each item gets an owner, a task, and a date.

I will issue the revised routing by Wednesday.

Structural will confirm hanger clearance by Thursday.

You will confirm the ceiling height change with the owner by Friday.

Reply to confirm your item and date, or flag it now if Friday does not work.

MAKE IT YOURS

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

the confirming line

what was reviewed and what was agreed

Each item gets an owner, a task, and a date. *item one, owner, task and date*

item two, owner, task and date *item three, owner, task and date*

the reply request

Read the full script. Scan the code, or go to https://clientreadypm.com/t/53

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KEY PHRASES

“To confirm we are on the same page”
Says the recap is a record of what was agreed.

“I will issue”
Names who acts, with the task and the date.

“Reply to confirm your item and date”
Asks for a reply, not for approval.

“flag it now if Friday does not work”
Lets people raise a problem early.

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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