



# 27

IRRESISTIBLE DONE-FOR-YOU SCRIPTS

*to master*

DIFFICULT CLIENT EMAILS

- navigate the most challenging client situations with confidence and ease -





## Have you ever had to answer a difficult question from a client over email?

Or have you ever been in that awkward situation when you had to ask the client to pay for the work you delivered?

We know how it feels.

You keep stressing about what you should say, you doubt every word you write and you worry how it will all come across. Will you still work together? Not to mention the eternal problem of “what should I put in the subject line?”.

Handling difficult conversations over email is part of running a business. The way you do it is part of the brand experience you want to create.

The idea for the **27 Irresistible DFY Scripts** came after discovering that many of our clients were struggling with difficult & awkward conversations over email. We realised this was a problem when we asked one client how long she spent agonising over 1 unpleasant conversation. Overall, it was a total of 2.3h. That's over **2 hours for one single email!**

To make sure you'll never waste 2h on 1 email, we created **27 Irresistible DFY Scripts to Master Difficult Client Emails**, the most time-saving, hassle-free, strategic way to navigate challenging client situations with confidence and ease. You will...

- sound like a pro
- negotiate smoothly
- find the win-win in every situation!

Best part? You will find the strategic thinking behind every email, because sometimes you might find yourself in situations that need:

- the eyes of an accountant
- the language of a lawyer
- the mind of a business strategist the fingers of a copywriter

These **27 Irresistible DFY Scripts** compile all this and more to help you close deals, speak professionally and always keep your eyes on your profit margin!

# About

## THE ORANGE NOTEBOOK

We are 3 female entrepreneurs that came together under one mission: **to empower ambitious business leaders to build a lasting brand legacy.** Together we bring to life new brands and transform existing ones.

We are inspired by a rich cultural experience and we reflect it back in the work we do. Our cosmopolitan outlook means we can gather insights from a Turkish Bazaar, a Romanian saying or a Swedish habit. A bit like a cultural kaleidoscope, we take in these experiences and translate them into rich branding visions and fluent strategy frameworks.

We shape your brand so that you can shape the future.

Let's connect!



Instagram 

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Facebook 

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Linkedin 

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*Stage 1*

# PRE-DISCOVERY CALL

This section contains emails scripts on:

- How to send an invitation for a discovery call without sounding icky
- How to answer the question: What's your price?





# 01 INTRODUCTION STAGE

HOW TO SEND AN INVITATION FOR A  
DISCOVERY CALL - WITHOUT SOUNDING ICKY

Sometimes discovery calls happen through word-of-mouth. A mutual connection introduces you, you met at an event or any other networking context.

Subject: It's so great to meet you

Hi [NAME],

I have your contact information from [common contact name]<sup>1</sup>, I am their [relationship with common contact name]<sup>2</sup> and he/she mentioned we should get in touch because [reason why you think you should connect - a problem].<sup>3</sup>

I thought it would be helpful if we knew more about each other. Perhaps we can share ideas together.<sup>4</sup>

Would you have a few minutes to connect on the phone briefly? I would like to learn more about you and your business. It will be a good opportunity to get a sense of how I can help and if we can work together in the future.<sup>5</sup>

Are you available to speak this week?<sup>6</sup>

Kind regards,  
[Your name]

## The Strategy Behind



01

People forget all the time. Establish familiarity by mentioning the mutual connection that introduced you.

02

Establish credibility by mentioning your relationship to the connection. E.g. "I am their friend / client / coach".

03

Be specific about the problem you can help them with, or the benefit you can bring to their business. Give them a reason to connect.

04

Start your connection from a place of equality; "sharing ideas" implies respect, rather than taking control of the conversation.

05

Be casual about a potential work collaboration. Don't be too forceful, or too committed right from the start. Remember this is your time as well to assess if the relationship is a good fit!

06

A timeframe makes it real, not just hypothetical.

# 02 INTRODUCTION STAGE

HOW TO SEND AN INVITATION FOR A  
DISCOVERY CALL - *WITHOUT SOUNDING ICKY*

If there is no prior relationship between you two, you may find it difficult to ask for a discovery call straight away. It's not impossible though. Here is how:

Subject: Can we stay in touch over email?

---

Hi [NAME],

Hope you're well. Just a quick email to say I came across your website/IG/LinkedIn and was impressed with **[find something that you think they are doing well]**.<sup>1</sup>

I thought it would be helpful if we knew more about each other. Perhaps we can share ideas together.

Would you have a few minutes to connect on the phone briefly? I would like to learn more about you and your business. It will be a good opportunity to explore further working together potentially.

Are you available to speak this week?

Kind regards,  
Your name



*The Strategy Behind*

## 01

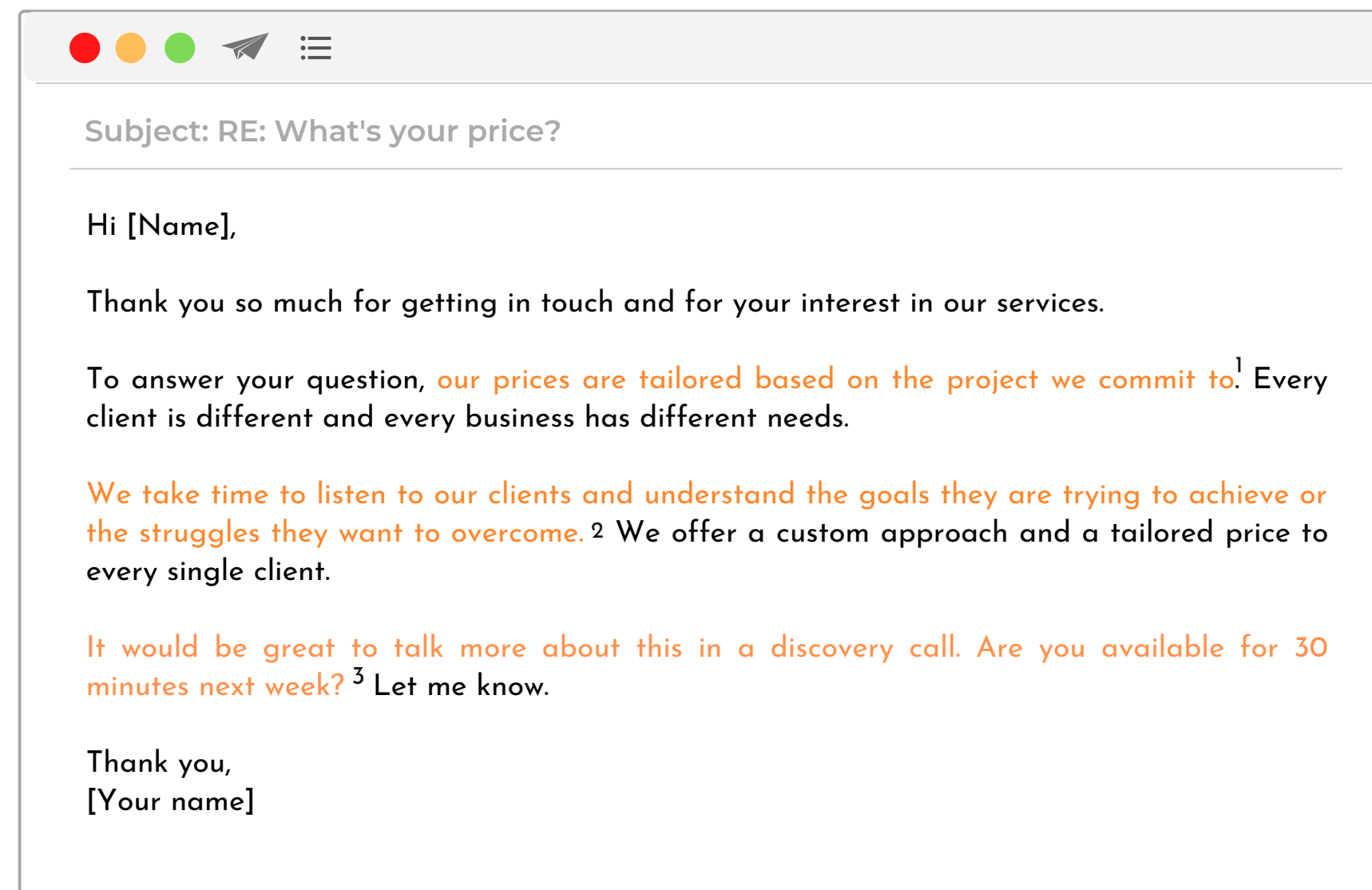
Everyone likes a compliment. Start the conversation by saying something you like about them. It doesn't have to be a huge essay, just genuine.



# 03 INTRODUCTION STAGE

HOW TO ANSWER THE QUESTION: WHAT'S YOUR PRICE?

There are situations when a prospective client initiates the conversation to ask you about prices. In most cases, this comes before the discovery call, without any prior contact. It shows that some people watch you closely and only contact you when they are ready to work with you.



*The Strategy Behind*

01

This shows you care about your clients and also removes the obligation to give them a fixed price.

02

This talks about your work approach.

03

This shows intention and desire to move forward with the conversion.



# Stage 2

## AFTER DISCOVERY CALL

Some discovery calls end without the prospect of a future collaboration, but others finish with an agreement that a proposal will be sent soon after the call. Here's how to handle the next steps with ease.

This section contains emails scripts on:

- How to follow up after a first call/meeting
- How to do a mini-proposal (or a Statement of Work) over email?





# 04 PROPOSAL STAGE

## HOW TO FOLLOW UP AFTER A FIRST CALL/MEETING

With a clear list of action steps you can keep a proactive tone and give your client the feeling you're already working together.

Subject: The next steps

Hi [NAME],

Thank you for your time on [insert day of the call / meeting].<sup>1</sup>

It was so lovely to meet you today and to learn more about your business. Based on the goals / problems we discussed,<sup>2</sup> I've put together a proposal that I am confident will meet your needs.<sup>3</sup>

However, if you feel there's anything that should be added or be tailored to meet your circumstances<sup>4</sup> in the best way possible, please let me know. We can hop on a call, to adjust as needed.<sup>5</sup>

Look forward to hearing from you.

Thank you,  
[Your name]

*The Strategy Behind*



01

This reference will remind them of your call in case they forgot or it happened a while ago.

02

This shows you listened to them in the call.

03

This shows you are confident in your services.

04

This shows you are flexible and ready to consider their specific situation.

05

This shows you are committed to the possibility of working together.

# 05 PROPOSAL STAGE

## HOW TO DO A MINI-PROPOSAL (OR A STATEMENT OF WORK) OVER EMAIL?

After the discovery call, you have a clear understanding of what the client needs and you're confident in your ability to deliver. But you simply do not have the time for a carefully drafted proposal, with design and formatting. Or maybe they requested to skip the show and dance of a 20-page proposal and just get straight to it. In this case, you just need to send out a clear email, so that the client knows what to expect.

P.S. You can use this as a backbone for creating a proposal template for other clients.

*The Strategy Behind*

### 01

This shows you are grateful for their time and appreciate that they talked to you about their business.

### 02

This shows you listened to them in the call.



Subject: The next steps

Hi [NAME],

Thank you for your time on (insert day of the call / meeting). It was so lovely to meet you today and to learn more about your business. **You shared a great deal of information and I want to thank you for your honesty.**<sup>1</sup>

Based on the goals / problems we discussed, I've outlined below our recommendations to help you **[overcome the current problem/achieve your goal]**.<sup>2</sup>

**Background:**<sup>3</sup> [insert client's business name] has started a business offering [insert the client's service] to [insert the client's audience].

**Problem:**<sup>4</sup> Without a [insert your solution for the client: website / brand / business strategy], [insert client's business name] cannot experience the [growth / recognition / results] it deserves.

**The Work:**<sup>5</sup> To achieve this, we will [insert all the services you will provide the client with]

**Measuring success:**<sup>6</sup> Based on past experience, we expect to [insert any metrics you use to evaluate success - increase web visits / increase sales / increase visibility / increase brand authority / increase content output / increase email signups].

**Timeline:**<sup>7</sup> Our expected timeline for this project is [insert agreed timeline]. We will also provide you with a sign-off process and a way to provide us with feedback. Once the project goes live, we will set a milestone of [insert milestone - 30 / 60 / 90 days] to review the results of the campaign and advise on the next steps.

**Investment:**<sup>8</sup> We require a one-time investment of [insert the total cost of the project]. We ask for 100% / 50% / 25% payment upfront to ensure your work is scheduled and prioritised. There are no hidden costs and we prefer to be transparent with our pricing and deliverables.

Look forward to hearing from you

Kind regards,  
[YOUR NAME]



# 05 PROPOSAL STAGE

## HOW TO DO A MINI-PROPOSAL (OR A STATEMENT OF WORK) OVER EMAIL?

After the discovery call, you have a clear understanding of what the client needs and you're confident in your ability to deliver. But you simply do not have the time for a carefully drafted proposal, with design and formatting. Or maybe they requested to skip the show and dance of a 20-page proposal and just get straight to it. In this case, you just need to send out a clear email, so that the client knows what to expect.

P.S. You can use this as a backbone for creating a proposal template for other clients.

*The Strategy Behind*

### 03

This shows you have listened to them/done your research about their business.

### 04

Establish the context for your proposal. Set out the problem, or if necessary, educate your client about the problem you can help with.

### 05

Walk them briefly through how you will work together. It gives your client reassurance and the feeling they are in control.

### 06

This sets the expectations for the impact this project will have on their business. It will help you convince them you are the best for the job!

### 07

This sets the timeframe expectations that you previously agreed on in the call.

### 08

Set the rules upfront with regards to cost and payment. This helps you protect yourself and tells the client what to expect. Also, the word "investment" has a more positive connotation than "cost".



## *Stage 3*

# AFTER PROPOSAL

One of the most nerve-wracking situations you go through, happens right after sending your proposal. The wait is unbearable, especially if it's a client you really want to work with. When should you expect an answer from them? It depends on the situation, but you should get at least the acknowledgement that they received the proposal. When is the right time to follow up? Again, it depends, but give it at least a week - entrepreneurs are busy!

This section contains emails scripts on:

- Following up after a proposal
- Following up with a revised proposal

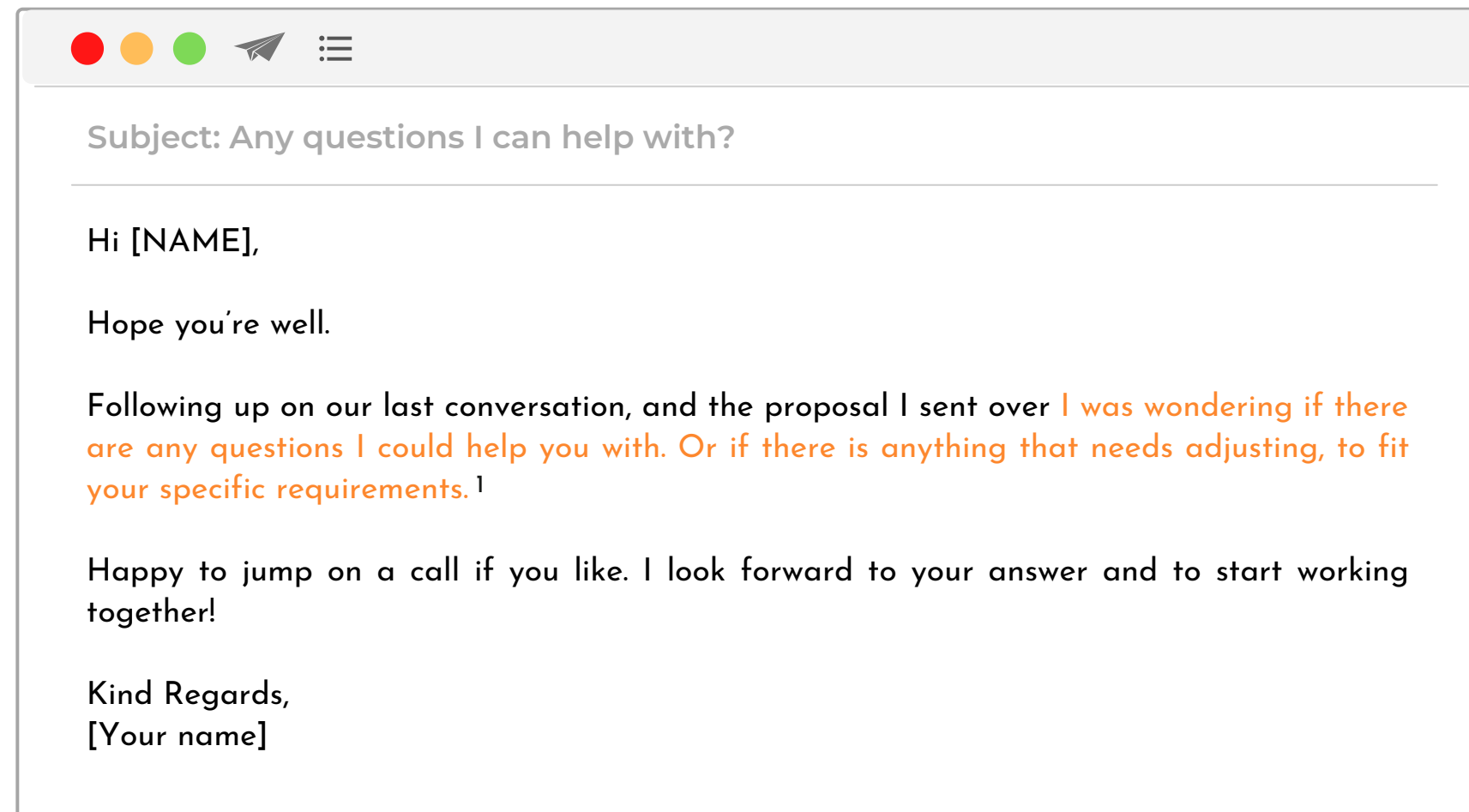




# 06 AFTER PROPOSAL STAGE

## FOLLOWING UP AFTER A PROPOSAL

If you haven't heard from them since you sent the proposal and you want to prompt a reply, you can offer to answer their questions. It's important not to come across as desperate at this stage, so don't bombard them with emails.



*The Strategy Behind*

## 01

This shows you are interested in working together and flexible enough to meet their needs.

# 07 AFTER PROPOSAL STAGE

## FOLLOWING UP WITH A REVISED PROPOSAL

There may be cases where your initial proposal wasn't the perfect match for their situation, but they are still willing to work with you. Don't panic and look at the positives, you have the chance to revise your proposal and show flexibility. However, make sure you don't compromise on what you stand for just to get the client. In the long run, you will struggle working together.

Subject: Revised Proposal

Hi [NAME],

Considering everything we discussed on [insert day you discussed the proposal],<sup>1</sup> we put together a revised proposal to best serve your needs with this project.

As you mentioned [their concerns],<sup>2</sup> this flexible approach will include [insert some of the things you kept] that we initially recommended, as well as [insert new things added or removed based on the client needs].<sup>3</sup>

We hope this revised approach can help [insert benefits like facilitate your workload / save time / minimal disruption to the business].<sup>4</sup>

We welcome your feedback and questions and we look forward to hearing from you.

Thank you,  
[Your name]

*The Strategy Behind*

01

This time reference will remind them about the conversation you had.

02

This shows that you listened to their concerns.

03

This shows you are flexible and ready to meet their needs.

04

This reminds them about the benefits of your services.



# Stage 4

## NEGOTIATION STAGE

This stage is one that many entrepreneurs feel nervous about, so if you are one of them, here's how to navigate it with confidence. First of all, you should understand that it's normal for clients to negotiate; everyone wants to run a business profitably. Questions about pricing are normal too because clients want to know what they pay for. Offer a good explanation that shows value to help them make a decision. You'll be saving them time and effort.

This section contains emails scripts on:

- How to answer: Why are you more expensive?
- How to answer: What's your hourly rate?
- How to answer: Why can't I have more free revisions?





# 08 NEGOTIATION STAGE

## HOW TO ANSWER: WHY ARE YOU MORE EXPENSIVE?

First of all, this is not an attack on you, you should take it as a positive sign that they are showing interest. Most probably they need to consider this expense in their financial plans or to justify it to their finance team.

### 01

This shows you are on their side, it helps influence their decision in a subliminal way.

### 02

Showcase any relevant social proof and show the transformation you can provide. This will help you convince them to work with you.

### 03

You can either use this, if you don't bill hourly.

### 04

Or if you do have an hourly-based model, you can use this to showcase your efficiency.

### 05

This touches on the value you provide and your dedication to the projects you commit to.

*The Strategy Behind*

Subject: To answer your question...

Hi [NAME],

That's a very good question. And with the range of prices out there, *it's natural you'll want to understand what's the best service for your buck.*<sup>1</sup>

To answer your question, there's an incredible amount of variation in the [insert your industry] landscape from individual contractors to huge consultancy firms, each with their own pricing.

We hold ourselves to a very high standard of quality, as demonstrated by our portfolio *[insert link to case studies]*.<sup>2</sup> And we always dedicate the most efficient resources for any project we work on.

*We avoid billing hourly, as this can lead to a less efficient way of delivering a project. Instead we offer a clear set of deliverables. That way you know exactly what you're paying for.*<sup>3</sup>

[You can replace the previous paragraph with this one if it's more relevant].

*For example, we won't load up the billing time with project management, if we don't think the project is extensive enough to need it.*<sup>4</sup>

Ultimately, what is most important for you is to guarantee the project comes out right the first time. *It's not worth the risk of scraping a 10k [insert the expected cost of the project] for trying to save 2k - 3k [insert any other estimated cheaper prices in your industry].*<sup>5</sup>

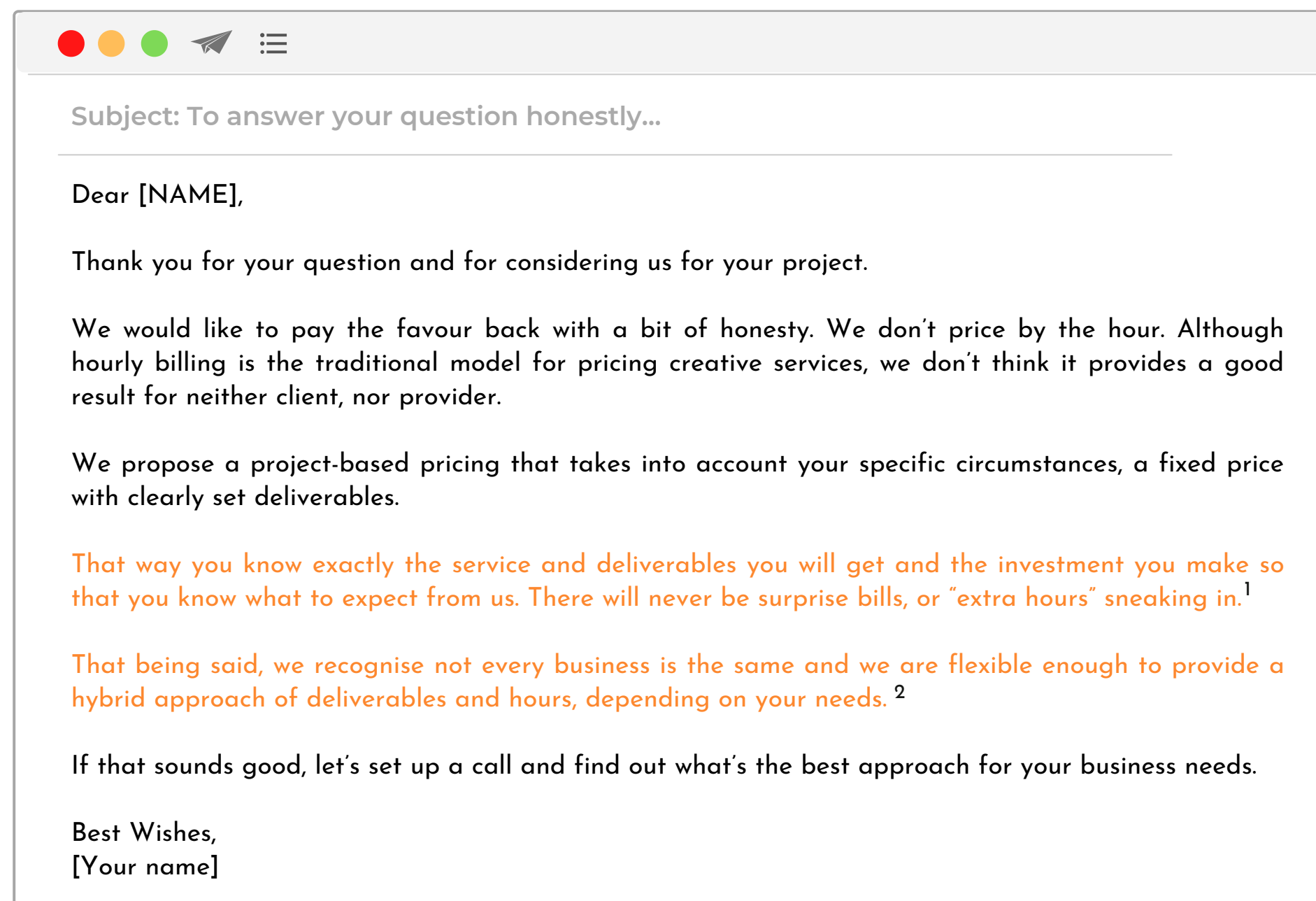
We hope this answers your question, and whatever choice you make, we hope it will get the job done beyond your expectations.

Thank you,  
[Your name]

# 09 NEGOTIATION STAGE

## HOW TO ANSWER: WHAT'S YOUR HOURLY RATE?

Some entrepreneurs find this question uncomfortable because they don't know how to charge for their services or because they are scared the answer will reflect badly, if it's too low. Or put clients off, if it's too high. Here's how to navigate that tricky field...



## The Strategy Behind

### 01

Educate your client about the perks of value-based pricing.

### 02

If you want to meet the client halfway, you can still offer a package that includes hours, without revealing your hourly rate. This also shows you are flexible and ready to meet their needs.

# 10 NEGOTIATION STAGE

## HOW TO ANSWER: WHY CAN'T I HAVE MORE FREE REVISIONS?

Some clients can be needy and have unreasonable expectations from your working engagement. It's important to set clear rules from the beginning so that you don't end up working extra hours for little money. Here's how to answer this tough question with confidence.

Subject: There is actually a good reason

Dear [NAME],

We typically offer a maximum of 2 revisions to clients. On most engagements, one revision period is sufficient, but we are happy to make an exception.<sup>1</sup>

The reason we do this, is because if a [insert service copy / design] project takes more than 2 revisions then there is some miscommunication of vision between us, which should be addressed in a conversation.<sup>2</sup>

In all fairness, all our clients have been happy with the initial delivery, or after one revision. During the course of a project, we have a few sign off points, to ensure there is always room for the client to address any concerns. This means we can stay on the same page throughout the project, and you can have a strong idea of what the end product will look like.<sup>3</sup>

Hope this addresses your concerns.

Kind Regards,  
[Your Name]

*The Strategy Behind*

01

This comment will make them feel special.

02

This shows you are ready to share the "blame".

03

Telling them about your work approach and mentioning previous happy clients will give them reassurance.



*Stage 5*

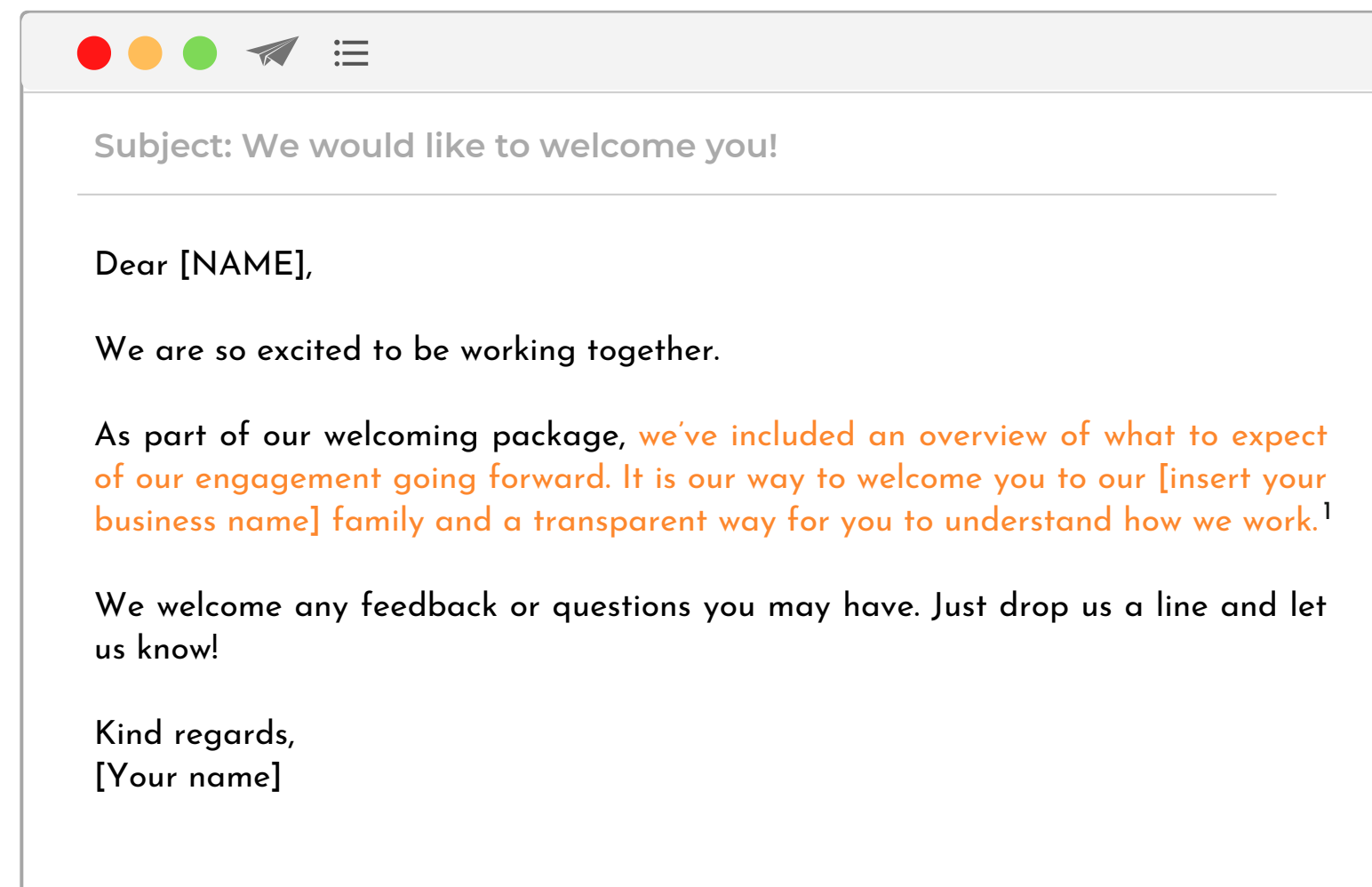
## CLIENT ONBOARDING

Congrats! This is the best stage in your client relationship.  
If you have a client onboarding package, send it out after the proposal sign-off. That way your client knows better what to expect out of your relationship and sets some much-needed boundaries.



# 11 ONBOARDING STAGE

WELCOMING A CLIENT ONBOARD



*The Strategy Behind*

**01**

This will give them reassurance and shows that you care about your relationship.



# Stage 6

## WORKING TOGETHER

This section contains emails scripts on:

- How do you tell your clients their hours have finished?
- How to answer the “it will only take you 5 minutes”
- How to handle a client’s objections to your work



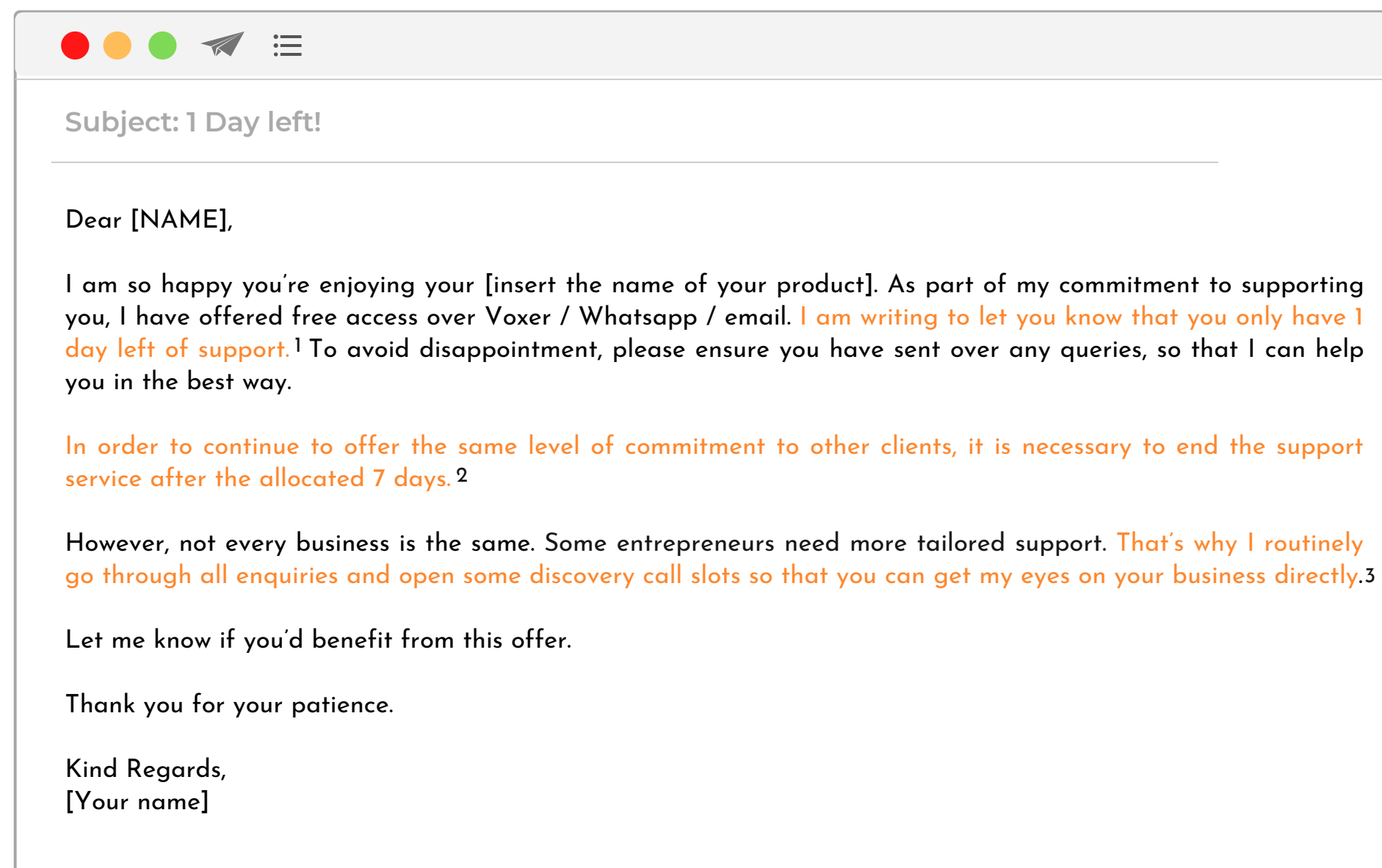
# 12

## WORKING TOGETHER STAGE

HOW DO YOU TELL YOUR CLIENTS THEIR HOURS HAVE FINISHED?

Let's say you provide 1 week of support with your offer / course / product over Voxer / WhatsApp / email. Trouble is your clients keep messaging you after the allocated time. You don't want to upset them, but you simply do not have the capacity to answer all those queries. Here's what you can do so that you don't get overwhelmed, and find a way to get paid for that extra time.

Be proactive. Don't wait until time has run out and you're drowning in requests.



*The Strategy Behind*

**01**

Be proactive and let them know how much time they have left.

**02**

Set clear expectations and be firm about your boundaries.

**03**

Offer them another option to work with you.

# 18

## WORKING TOGETHER STAGE

### HOW TO ANSWER THE “IT WILL ONLY TAKE YOU 5 MINUTES”

Sometimes clients will ask you to do “little” tasks that in their view would “only take you 5 minutes”. Trouble is, more often than not, it doesn’t. But the requests don’t stop and when it all adds up you’re in fact spending up to a few hours a week, on these “5 mins” tasks. For an entrepreneur, that is time when you can’t take care of your business, or other clients.

We don’t typically advocate for an hourly contract, but there are certain situations when this may save your profit bottom line. That way, either the “5 minutes” requests stop, or they get paid for.

Subject: Monthly ad-hoc support offer

Dear [NAME],

I’m so happy with the way this project is going and I love that you’re so keen on moving things faster.

There have been a few small, recent additions to the core project which we both know are essential.<sup>1</sup> But in order to be able to prioritise your requests so that there are no delays, it may be necessary to consider an hourly based contract for ad-hoc support on a monthly basis. This is to ensure that any requests coming in are dealt with promptly and efficiently, so that it doesn’t harm the outcome of our project together.<sup>2</sup>

Let me know how you’d like to proceed.

Kind Regards,  
[Your name]

*The Strategy Behind*

#### 01

It sets the context and shows you acknowledge the need for the extra tasks.

#### 02

This shows you are flexible and keen on supporting them further.



# 14 WORKING TOGETHER STAGE

## HOW TO HANDLE A CLIENT'S OBJECTIONS TO YOUR WORK

There may be situations when you don't see eye to eye with your client. You may get negative feedback which is not something you should panic about. Creative differences are very common and usually lead to better outcomes. To ensure the client is satisfied, make sure you understand their vision and reflect it in the work you produce.

Subject: RE: Feedback

Hi [NAME],  
  
Thank you for your feedback on [name of the project/task]. I would love to understand your perspective a bit better, therefore can you answer some questions for me?<sup>1</sup> This will help me tailor the work better.  
  
What do you not like about [the task]? Please be as specific as possible.  
Do you have a particular vision in mind? Could you describe it for me?  
Do you have any examples on how it should look in your opinion? Could you share them with me?  
  
I'm very interested to see this project from your perspective<sup>2</sup> and I'm happy to have a call too if that's easier.  
  
Thank you,  
[Your name]

*The Strategy Behind*

01

This shows you are ready to listen to them.

02

This will make them feel involved in the project.



# Stage 7

## CHANGE OF PRICING

You're running a business and naturally you want to make it profitable. It's normal to raise your prices every now and then in line with what is happening in your industry, your personal circumstances or the changes you are implementing in the business. But a change of price can be less welcomed by the client. You may be worried that they will cancel your engagement, but that's not likely to happen if the increase is reasonable and if you have proved that you can provide value.

To make sure you handle this uncomfortable situation with ease and confidence and keep that relationship going, try these approaches:



# 15 CHANGE OF PRICING

## HOW TO TELL YOUR BEST ESTEEMED CLIENT YOUR PRICES HAVE GONE UP THIS YEAR

There may be situations when you don't see eye to eye with your client. You may get negative feedback which is not something you should panic about. Creative differences are very common and usually lead to better outcomes. To ensure the client is satisfied, make sure you understand their vision and reflect it in the work you produce.

### 01

Remind your client of the positive achievements you've shared together.

### 02

Start by showing value. Tell your client how the changes you're preparing will bring them added value.

### 03

Introduce the new pricing and reassure clients about what this means for them.

### 04

No one likes surprises on their bill. Specify the rates for any work in progress and be clear about when the price change comes into effect.

*The Strategy Behind*



#### Subject: Important Updates for 2021

Dear [NAME],

Hope this year is treating you well and you've had a great break.

Looking back on what we achieved together the past year with your new [website, content, design, branding, launch, product, ads, email campaign, any other BIG WIN],<sup>1</sup> I can't help but feel excited and hopeful about where the next project will take us.

We are preparing for lots of exciting things and can't wait to share them all with you.

There will be [----- insert change 1 like an extra strategy session]  
And [----- insert change 2 like an audit]  
As well as [----- insert change 3 like hiring new people for faster turnaround].<sup>2</sup>

All these changes have been done with a focus on constantly improving our service and delivery quality to make your experience even better.

This means that for next year our service rate will change from [---- insert your current rate] to [--- insert new rate]. This is only a [insert percentage ---- % rise]<sup>3</sup> but it will allow us to focus more closely on the work we do together.

In short: better turnaround times, more availability for you and more focus on your business.

With regards to the work that is already in progress our rates remain the same. The price increase will come in effect [---- insert date].<sup>4</sup>

If you have any questions about these changes, please get in touch.

Kind Regards,  
[Your name]



*Stage 8*

## CHANGE OF SCOPE OF WORK

Scope increases are not fun for neither you, nor the client. Some clients will take a proactive approach when the project balloons out of the initial agreement of cost and time, and will ask you for an addendum to contract or to draft a new contract, but not everyone's the same. In this case, you should take the initiative. Here's how.

This section contains emails scripts on:

- How to (graciously) request scope increase charges
- How to (graciously) request money to fix work the client is not happy with
- How to ask your clients for more projects



# 16 CHANGE OF SCOPE OF WORK

HOW TO (GRACIOUSLY) REQUEST SCOPE INCREASE CHARGES

Subject: We might need an addendum

Hi [NAME],

In light of our recent conversations,<sup>1</sup> it seems the scope of the project has changed since our initial agreement.

To reflect this, we re-assed and found the project will now require [insert new requirements time / resources] in order to get the results we would like to see.<sup>2</sup>

Of course, we are happy to take our collaboration in a new direction, but we need to address these changes in a revised contract, or by including amendments to the original one.<sup>3</sup>

We will also send you an updated delivery timeline / project management once everything is agreed.

We know that project changes can be unexpected, so please feel free to reach out to us with any questions. Happy to jump on a quick call too, if that works best for you.<sup>4</sup>

Kind regards,  
[YOUR NAME]

*The Strategy Behind*

01

Remind them that you have previously discussed the need for changes or additions to the project.

02

This will help them understand what is needed and help them feel in control.

03

This shows flexibility, professionalism and that you are taking this project seriously.

04

This shows you care about their potential concerns.

# 17 CHANGE OF SCOPE OF WORK

HOW TO (GRACIOUSLY) REQUEST MONEY TO FIX WORK THE CLIENT IS NOT HAPPY WITH

Depending on how bad the project has turned out or whose fault it is, you can assess whether there is a case to ask for money. After all, you don't want a negative review. However, if you feel you've done everything in your power and the client is still not satisfied with the end result, there may be a way to salvage some of your revenue, or at least break even on the project.

01

Show the client you are dedicated to their project and you will do everything in your power to address their concerns. For example, prioritising their work.

02

This explains the problem from your perspective. Maybe there is a misunderstanding somewhere.

03

This shows flexibility and commitment.

04

Making the client an offer is a proactive step and a sign of goodwill.

05

This reminds them you too are running a business.

*The Strategy Behind*

Subject: Would you like to tell us more?

Hi [NAME],

It is incredibly important to us that you are happy with the final deliverable and we are committed to doing everything in our power to make sure this happens. As such we would be happy to extend this project, and prioritise your work to make sure these revisions are addressed as soon as possible.<sup>1</sup>

We do our best to avoid additional revisions after a final deliverable, by gaining your approval through our series of client sign-off points, but it seems we missed a step here. In the last revision of the project your feedback was [re-iterate client feedback], and we did [insert your steps] to address those edits.<sup>2</sup>

Can you help us understand where we might have missed the mark? Happy to have a call free of charge to clarify this in the best way possible.<sup>3</sup>

Because we want you to have a positive experience, we are happy to continue work on the project at a reduced rate of [insert what reduced rate / discount you can offer - typically a 50% reduction is expected].<sup>4</sup>

As a smaller agency, our budgets are often tight, and while we would like to offer the work free of cost, we don't have the financial ability to do that.<sup>5</sup>

Thank you and we look forward to your answer.

Kind Regards,  
[Your name]

# 18 CHANGE OF SCOPE OF WORK

## HOW TO ASK YOUR CLIENTS FOR MORE PROJECTS

If you enjoy working with a client and you think you have a good relationship, it would be a shame to stop the engagement when the project comes to an end. If you are keen on continuing working together, you should ask for more projects. If you don't ask, you don't get.

Subject: How else can I help?

Hi [Name],

Hope you're well. Just a quick message to say thank you for the opportunity to work on [name of the project]. It was a great pleasure to be part of your business and I thoroughly enjoyed the challenge.<sup>1</sup>

I would love to continue working with you because your company has a great mission which I find inspiring<sup>2</sup> and I feel together we can take it further.

Are there any other projects you would need help with? If not, I have a couple of ideas that I would love to run by you.<sup>3</sup> Are you available for a chat next week?

Thank you,  
[Your name]

*The Strategy Behind*

### 01

Tell them how much you enjoyed working together.

### 02

Show them it's not all about money, you are keen on working towards the same goal.

### 03

Be intentional and direct about it. It shows courage and determination. Be proactive and suggest new ideas you can help them with.



# Stage 9

## PAYMENT COLLECTION

Delayed payments are a thing. It happens more often than you think in the business world. In some cases, the client doesn't want to pay, in other cases they forgot or don't consider it a priority.

Regardless of the situation, if you have a signed contract with clear payment rules and you have delivered the work you committed to, so you are entitled to ask for the payment. How you do that can influence the relationship going forward. Here's one approach.





# 19 PAYMENT COLLECTION

## HOW TO (GRACIOUSLY) REQUEST TO BE PAID ON TIME

Before we get to the script, there is one thing you can do to prepare ahead for the "I didn't get the invoice". Whether you are invoicing manually or automatically through your accounting software, you can simply add this line to your invoice email:

Could you please confirm receipt of this invoice so that we can keep accurate records within our accounting system? Thank you.

### 01

This reminds them about the timeframes agreed in the contract.

### 02

Show kindness and understanding, maybe they missed the invoice.

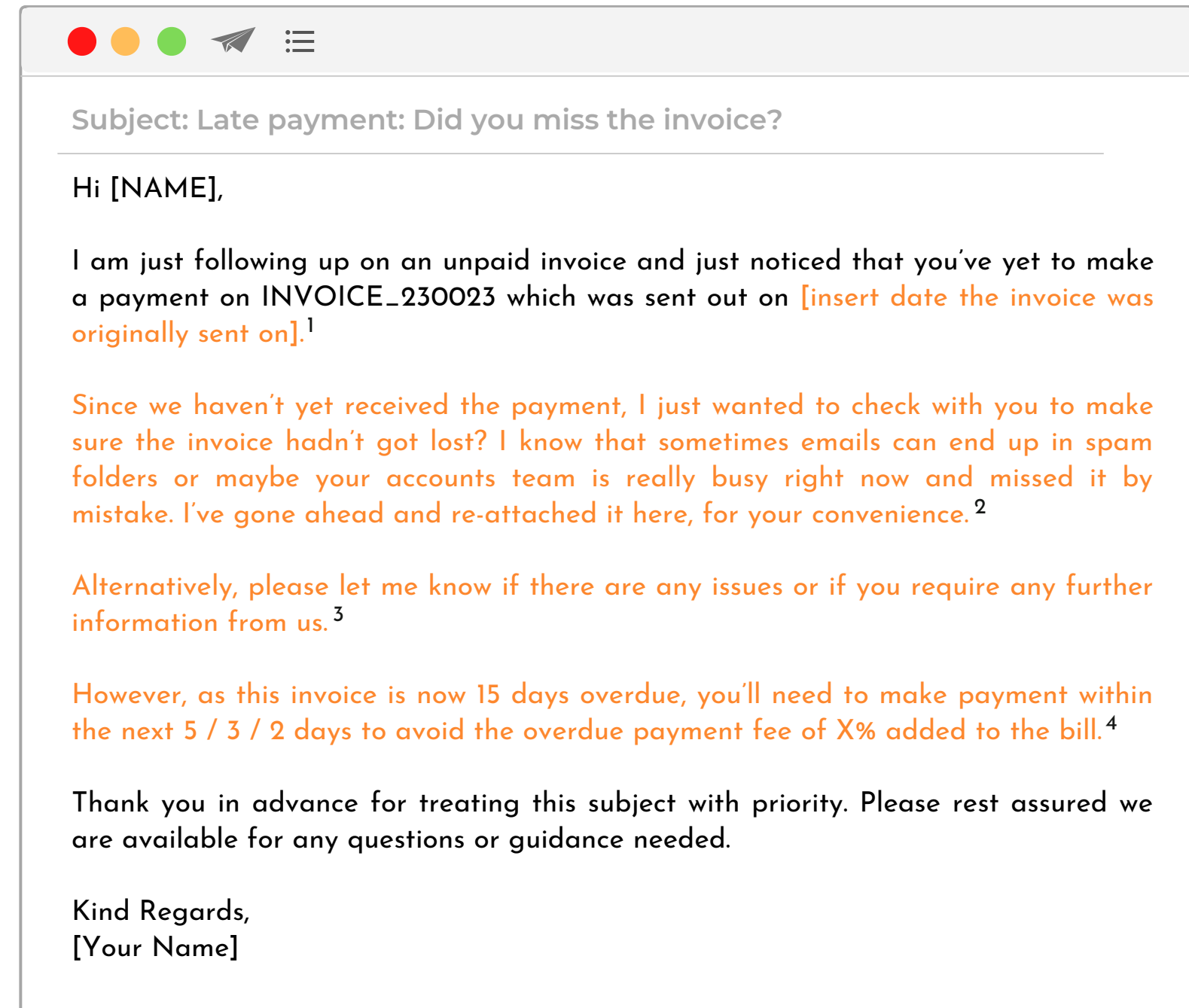
### 03

This shows you are there to help.

### 04

Only use this, if you have a late payment fee policy. Otherwise, simply remove it from the email.

*The Strategy Behind*





# Stage 10

## THE BREAK UP

The final, and the most painful email of them all, is the break-up email. There are times when despite your very best efforts a client relationship simply doesn't work anymore. Perhaps it was a bad client to begin with, perhaps things have changed along the way, bottom line is if it's damaging your mental health, your bank account or any other aspect of your life, it's better to let it go.



# 20 BREAK UP STAGE

## HOW TO (GRACIOUSLY) BREAK UP WITH A CLIENT

### OPTION 1

There are times when you simply want to be honest and open about the reason for the break up. If you don't want to continue this relationship under any circumstances, it's best to make it clear.

Subject: Outside scope of work

Dear [NAME],

We hope this email finds you well.

Unfortunately, we will need to terminate our engagement effective [insert date of termination].<sup>1</sup>

Due to recent problems and delays, it has come to our attention that we are not a good fit for each other. Your requirements lay, unfortunately, outside the scope of work we provide as a company.<sup>2</sup>

We would like to recommend [insert a friend that offers a similar service], who have a greater focus on [insert the client's main need] and may be a better fit for your needs.<sup>3</sup>

If you would like to discuss this further, I am happy to have a call and clarify any remaining work, or how to make the transition as easy as possible for you.<sup>4</sup>

We would also like to reassure you that any confidential information you provided us with for this project will be swiftly and efficiently disposed of.<sup>5</sup>

Kind Regards,  
[Your Name]

## The Strategy Behind

### 01

Give them enough notice, nobody wants to be taken by surprise.

### 02

You can choose to state the problem, just try to stay away from putting the blame squarely on your client. Leave no bad blood between you.

### 03

Make sure you check with the friend ahead.

### 04

Show flexibility and clarify any pending projects to make the transition smooth for your client.

### 05

Reassure them of how you'll handle any sensitive information to protect both yourself and the client.

# 21

## BREAK UP STAGE

HOW TO (GRACIOUSLY) BREAK UP WITH A CLIENT

### OPTION 2

Sometimes, things are a bit more difficult. Maybe you are experiencing difficulties personally or professionally. Maybe you want to remove an outdated service, or you just need to cut down on some clients, but not others and you don't want the word to spread. In that case, an excuse is the safest option.

Subject: We are changing direction

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Dear [NAME],

We hope this email finds you well.

We wanted to let you know that as of [insert date], I will no longer be able to offer [insert the service you no longer want to offer].<sup>1</sup>

Our company is moving in a new strategic direction and unfortunately that means closing down some of our current services.

I apologise for the inconvenience this may cause, but I would like to recommend [insert friend that still offers this service].<sup>2</sup>

Alternatively, please let me know if you'd like to know more about our new offerings and if it can be of help in the future.<sup>3</sup>

Thank you so much for your business over the years. We wish you the best for the future.

Kind Regards,  
[Your name]

## The Strategy Behind

### 01

Be clear about what you're no longer offering and tell them when they should expect this change to happen.

### 02

Try to make their life easier by recommending an alternative. Just make sure you've informed your friend in advance.

### 03

If you want the client to continue working with you on another service, use this.

# 22 BREAK UP STAGE

HOW TO (GRACIOUSLY) BREAK UP WITH A CLIENT

## OPTION 3

In case you have a client that's proving too much hassle for the money you're getting, you can try the fee-increase approach.

Subject: Our fees are changing

Dear [NAME]

I'm writing to you to let you know that as of [insert date], the fees for some of our services will be increasing. You can see the new fee structure on our website [HERE](#) [if you do not have the updated fees on your website, you can simply list them in the email].<sup>1</sup>

As this includes the service you are using, I'm letting you know so that you can decide if you'd like to continue with our engagement.<sup>2</sup>

Please feel free to contact me if you have any questions, or you'd like to discuss things further.

Kind Regards,  
[YOUR NAME]

*The Strategy Behind*

## 01

Tell them what they should expect.

## 02

Give them the choice to continue or stop your work engagement.



# 23 BREAK UP STAGE

## HOW TO SAY NO TO A CLIENT WITHOUT RUINING YOUR RELATIONSHIP

When a client wants you to do something entirely different to what you suggested:

Subject: We cannot commit at this stage

Dear [NAME],

Thank you for considering us for your project.

Our recommendations for the proposed advisory scope are X, Y, Z [insert your recommendations].

After careful consideration, we determined it is not possible to fulfil the suggested measures of A, B, C [insert the client's expectations].

In this context we do not consider it would meet the expected outcome you put forward.

We do not like to disappoint our clients and we consider it is far better to be honest upfront than to commit to something that would leave you with a poor experience.<sup>1</sup>

If you would like we can put forward a few suggestions of friends and contractors we worked with in the past that may be able to help you. Otherwise, we hope to hear from you in the future, if there are any other exciting projects we can help with.<sup>2</sup>

Thank you for your interest.

Kind Regards,  
[Your name]

## The Strategy Behind

### 01

This shows you are not taking clients just for the money.

### 02

Offer them some alternatives, it shows you still care.

# 24 BREAK UP STAGE

## HOW TO SAY NO TO A CLIENT WHOSE BUDGET IS TOO SMALL FOR THE PROJECT REQUESTED

Some clients do not appreciate the complexity or volume of work a project may take. They have a specific budget to allocate to the project, but it may be too small for the scope they need. Educate them about this in a polite way and give them some options on how to still work with you.

Subject: Budget and scope revision

Hi [NAME],

Thank you for the email and for thinking of us with regards to [name of the project].

We assessed the scope of the project and the budget you have allocated and unfortunately, we find there is a mismatch between the two. The allocated budget can not cover the scope of work for this project.<sup>1</sup>

We would love to help you, but the only options for this to happen is to either revise the scope or to increase the budget.<sup>2</sup> We can discuss this further to establish your expectations from this project and see if we can adjust it to meet the budget.

Please let us know what you prefer.

Thank you,  
[Your name]

## The Strategy Behind

### 01

Be honest about the reason you cannot take the project, the client may not have considered this aspect.

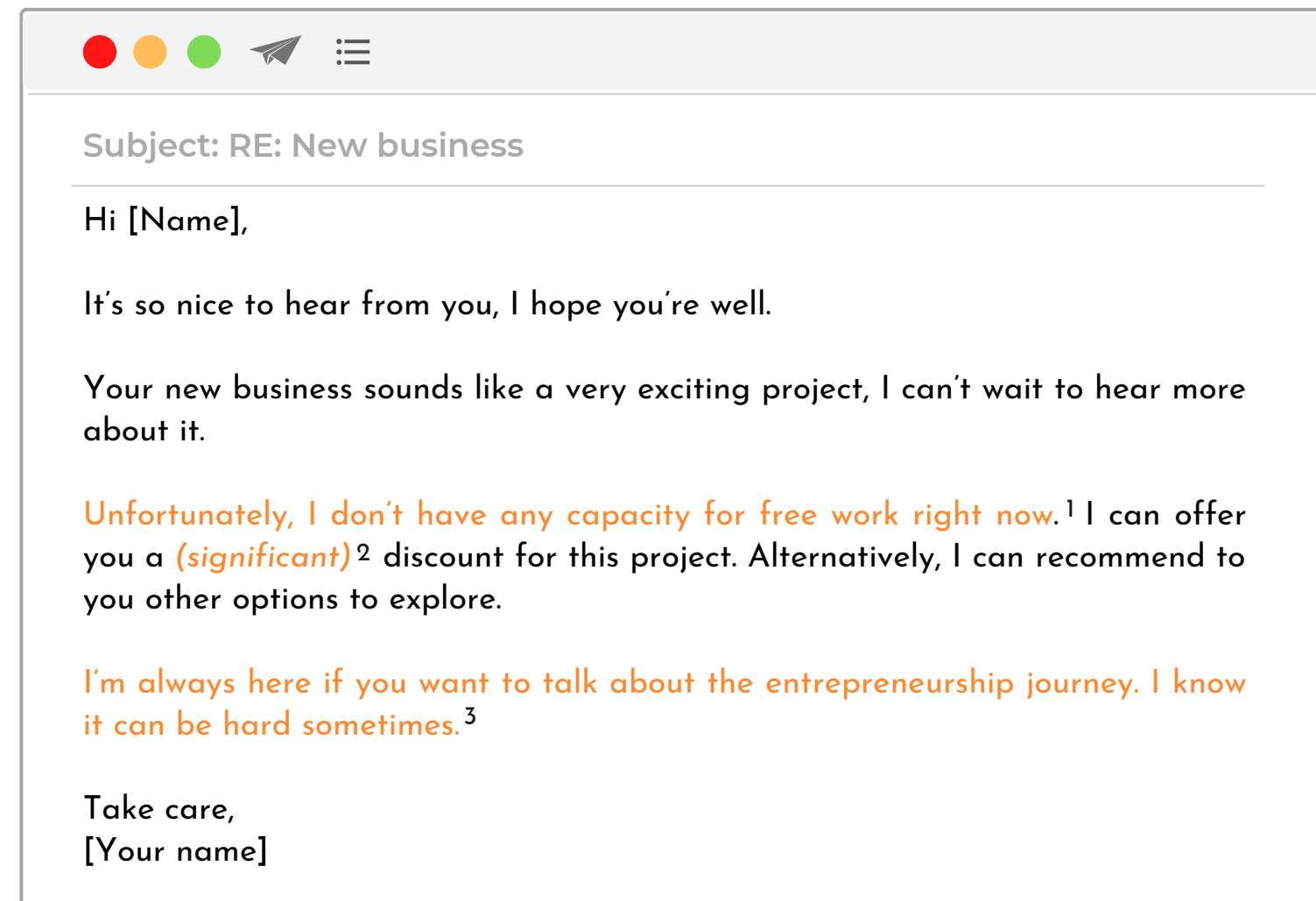
### 02

Show them you still want to work with them and give them some options to make this happen.

# 25 BREAK UP STAGE

## HOW TO SAY NO TO A FRIEND WHO WANTS YOUR SERVICES FOR FREE

This can be quite an uncomfortable situation, but remember that you are a business owner and you need to bring revenue to your business. Be nice and polite, but firm about it. Your friend should understand you if they run a business as well.



## The Strategy Behind

### 01

Be honest and tell them you don't want to work for free. Offer them a discount to show you're a good friend still.

### 02

It is entirely up to you how significant the discount should be. If you don't want to cut down too much, feel free to remove it.

### 03

Show them you're there for them if they need advice.



# Stage 11

## AFTER THE ENGAGEMENT ENDS

Congrats on reaching another great milestone in your relationship! Hopefully you delivered the project above expectations and your client is very satisfied. It's time to ask for well-deserved feedback. But entrepreneurs are busy and may not consider this a priority. Make sure you make their life easier with this template.

This section contains emails scripts on:

- How to request testimonials
- How to request a refferal



# 26 END OF ENGAGEMENT STAGE

## HOW TO REQUEST TESTIMONIALS

### 01

This shows you are open to feedback and care about their opinion.

### 02

This shows initiative because you acknowledge their time is precious.

### 03

Reassure them they stay in control of the final version that goes public.

### 04

Make sure you allow the client to express any other type of feedback as well. You don't need to include it in your testimonial, of course. But it's a valuable opportunity to learn what else can be improved in the future.

*The Strategy Behind*

Subject: Would you like to tell us more?

Hi [NAME],

Hope you're well [add any other personal details].

I wanted to reach out today because I truly enjoyed working with you on [enter the project you worked on here] and I wonder if you could take a moment to answer a few questions about our time working together. <sup>1</sup>

I know you're really busy with [insert name of client's business] so just feel free to type in your answers or make some notes under the bullet points below. <sup>2</sup> I can draft a testimonial and send it back to you for your final approval.<sup>3</sup>

- What are some tangible results you've had since our project?

[If the service you provide does not translate into results, replace this question with:

- How do you feel the project we've worked on will help your business further?
- Did you feel you had a good customer experience working with us? Anything that you think worked particularly well?
- While working together, did you feel my interactions have been prompt and efficient?
- What was one thing you would tell a friend about from our experience together?

Other than these questions, please tell us of anything you feel could be improved as well. <sup>4</sup>

Thank you so much for taking the time to answer these questions.

I look forward to your feedback!

Best, [Your name]



# 27 END OF ENGAGEMENT STAGE

## HOW TO REQUEST A REFERRAL

When you feel the project has gone really well and your relationship with the client allows for it, do not miss the opportunity to ask for a referral. Word-of-mouth is still one of the greatest drivers of new business for entrepreneurs.

P.S. You do not need to wait until the project is over to use this email. Simply adjust it, to reflect the stage of your relationship.

### 01

This shows you enjoyed working together and leaves a door open for future collaborations.

### 02

Be confident about asking for new business. Most people are happy to recommend.

### 03

Give them an incentive to recommend you to other entrepreneurs.

*The Strategy Behind*

Subject: Spread the word

Hi [NAME],

Hope you're well [add any other personal details].

I wanted to reach out to say I loved the opportunity of working together and that I am always at your service, should you ever need help in the future. <sup>1</sup>

As you know, I'm very passionate about the work I do and I love helping entrepreneurs with [insert area of expertise that you help with or challenge]. I was wondering if you know anyone else who might be interested in [insert service you offer]. <sup>2</sup>

Feel free to pass my name along, or give them my contact details.

It would be worth mentioning that I operate a "recommend me" scheme where for every new client that comes from a recommendation, I offer [insert what you'd like to offer in exchange. It could be anything from a one-off free service, to an Amazon / coffee / retail voucher, cashback]. <sup>3</sup>

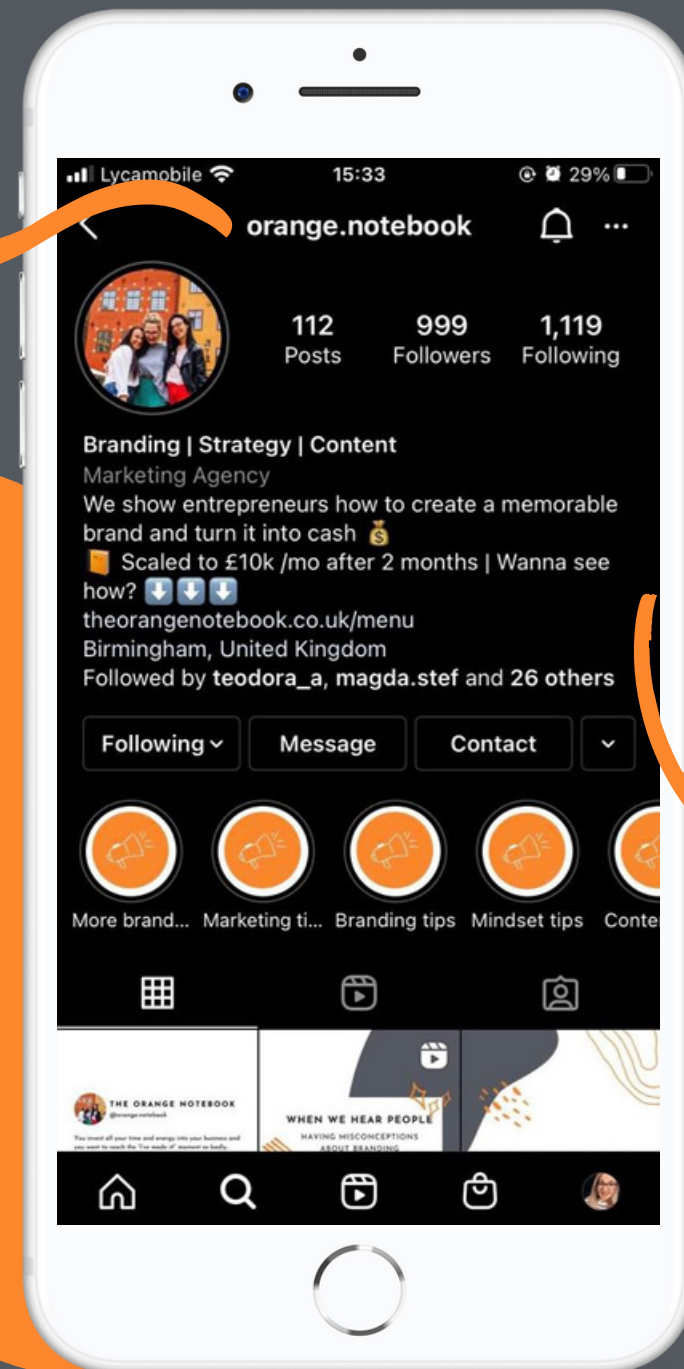
Any questions, drop me an email.

Thank you,  
[Your name]

# Let's connect!

We'd love to hear how this resource has helped you!

FOLLOW US ON  
INSTAGRAM



CHECK OUR  
WEBSITE