

Freelance Client Communication — Workbook

This workbook turns the course into a working communication system you run on every client. Complete each section as you finish the matching module, and by the end you will have a written communication agreement, a weekly status update format, an async tool stack, a de-escalation script, delay and scope-change scripts, and a reusable message-template library. Use the templates to track touchpoints, draft your updates, and never improvise a hard conversation again.

The Communication System That Earns Trust

Diagnose your current communication, write a one-page client agreement, and map every touchpoint to a default channel and tone.

Exercise: Diagnose Your Last Client Relationship

Think back to your most recent client. Walk through how you communicated and find the gaps that cost you trust or energy. Be honest about silence, scattered channels, and the moments you went on the back foot.

- What was the longest stretch the client went without hearing from you, and how did they react?

- How many times did the client have to chase you for an update or an answer?

- Across how many different channels did your communication happen, and did anything important get lost?

- Which single habit, if you had it, would have prevented the most friction in that relationship?

Worksheet: Write Your One-Page Communication Agreement

Draft the agreement you will present during onboarding on your next project. Fill in each field with a concrete, sustainable answer you can keep on your worst week. Aim for one short paragraph the client can read in under a minute.

Primary channel for decisions and approvals (and how often you check it)

Channel for quick questions and light back-and-forth

Channel for walkthroughs and demos (recorded video tool)

Response window during business days (state a clear figure, e.g. within one business day)

Your working days, hours, and time zone (and when you are offline)

Day and time your weekly status update lands (e.g. Friday by 4pm)

The single urgent path and what actually qualifies as urgent

Worksheet: Map Every Client Touchpoint

List the recurring moments you communicate with a client and pre-decide the channel and tone for each, so even a rushed message lands as professional. Use the Touchpoint Map template to make this reusable.

Acknowledging a new request: channel and target time to reply

Weekly status update: channel and day/time

Sending a draft for review: channel and how feedback should be given

Asking a blocking question / chasing an answer: channel and tone

Reporting a delay or problem: channel and tone (never a casual chat)

Closing a milestone or the project: channel and what is included

Checklist: Foundation Readiness Checklist

- I have a written communication agreement to present at onboarding
- My response window is one I can keep on a busy week, then beat
- I have defined which channel is for what, and which I do not use
- I have a fixed day and time for my weekly update
- I have an acknowledgement reflex: I confirm receipt within my window even when the full answer comes later

Async First: The Tool Stack and the Status Update

Assemble a lean async tool stack and build the weekly status update that takes under ten minutes and prevents every chasing email.

Worksheet: Assemble Your Async Tool Stack

Choose one tool for each job and write down what each is for, so you route every message to the right place and nothing important gets buried. Pick tools you already know rather than chasing new ones.

Email tool for decisions, approvals, and records

Chat tool for quick questions (e.g. Slack or Teams)

Screen-recording tool for walkthroughs (e.g. Loom or CleanShot)

Shared workspace where the client can see status (e.g. Notion, Trello, Basecamp)

Scheduling link for the rare call (e.g. Calendly or Cal.com)

Routing rule: which message types go to email vs chat vs video

Exercise: Script a Two-Minute Loom Walkthrough

Plan a short recorded walkthrough for a draft or update so it replaces a meeting. Draft the three beats below, then record a practice version and watch it back at 1.5x as your client would.

- Purpose in the first ten seconds: what is this video and what do you need from them?

• The substance: the two or three things you will point at and explain on screen.

• The single ask at the end: the one decision or action you need from the client, by when?

Worksheet: Draft Your Weekly Status Update

Build your reusable weekly update using BLUF and RAG status. Fill in each part for your current project, then save the structure as a template you fill in under ten minutes every week.

Headline (BLUF): the single most important sentence

Overall RAG status: Green / Amber / Red and why

Done this week: two or three concrete completions

Up next: what you will do before the next update

Needs you: what you are waiting on from the client, with a dated deadline

Risks or notes: anything that could affect timeline, scope, or budget

Checklist: Sending Work for Review Checklist

- I stated what the draft is and is not (e.g. structure, not final polish)
- I asked targeted questions instead of let me know your thoughts
- I set the scope of this feedback round and labeled it (e.g. Round 1 of 2)
- I told the client exactly how and where to leave feedback
- I gave a feedback deadline tied to the next delivery
- I will consolidate scattered feedback into one numbered list and confirm before changing anything

Tone Under Pressure: Hard Conversations

Build the language habits, the delay script, and the de-escalation script that hold your tone and the relationship together when things go wrong.

Worksheet: Write Your Delay / Bad-News Message

Draft a reusable bad-news message using the repair framework. Write it now, while calm, so you can adapt it fast under pressure. Pair the problem with a recommended solution.

Acknowledge: the issue and its impact on the client, stated plainly

Own: your clear responsibility, without a pile of excuses

Plan: the new, realistic date you are confident you can hit

Prevent: what you are changing so it does not recur

Options + recommendation: at least one path forward and which you advise

Written reset: the confirmation line that locks the new date

Exercise: Rewrite a Reactive Message

Take a real or imagined situation where a client pushed back and you felt defensive. Write the message you would have sent in the heat of the moment, then rewrite it after a pause using acknowledge-first.

- The reactive version: what would you write while feeling attacked?
 - Where in that draft do you sound defensive, or jump to facts before feelings?
 - The acknowledge-first rewrite: open by naming the client's concern, then address facts and solution.
 - Reading it as the client on a stressful day, what one sentence still needs softening?
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Worksheet: Script Your Scope-Pushback Response

Prepare the calm-middle response for when a client asks for work beyond the agreement, so you neither cave nor fight. Fill in the language you will reuse.

Acknowledge the request as reasonable (your opening line)

Locate it relative to agreed scope (what was and was not included)

Rough size of the add-on (hours or a small flat figure)

Neutral choice you offer (fold in now vs queue for a later phase)

Your line that keeps it collaborative, not confrontational

Checklist: Hard-Conversation Readiness Checklist

- I acknowledge the feeling before I address the facts
- I pause on emotionally charged messages and reread as the client before sending
- I always bring at least one proposed solution with any problem
- I confirm resolutions and new dates in writing
- I frame boundaries as a benefit to the client, not a wall

Systemize It: Templates, Cadence, and Closing

Turn your communication into a reusable template library, a sustainable batched cadence, and a clean close that earns testimonials and referrals.

Worksheet: Build Your Message Template Library

Write each recurring message once, at your best, with obvious placeholders for personalization. Store them where you can grab them in seconds. Use the Template Library spreadsheet to track them.

Welcome / kickoff message (restates plan + communication agreement)

Weekly status update (BLUF + RAG structure)

Feedback request (frames the round and the questions)

Delay / bad-news message (acknowledge, own, plan, prevent)

Gentle nudge for an overdue approval or asset

Polite payment reminder for an overdue invoice

Project-close + handoff message (with testimonial / referral ask)

Worksheet: Design Your Sustainable Cadence

Set the batched windows and automation that let you keep your promises without burning out. Fill in your actual times and tools.

Daily message-processing windows (two or three fixed times)

Deep-work blocks where email and chat stay closed

Recurring calendar block for the weekly update

What you automate (reminders, scheduling) vs keep human (the message itself)

How you will recalibrate if a client overuses the urgent channel

Exercise: Plan Your Project Close

Design the deliberate close for a current or recent project so it does not trail off into silence. Draft the handoff and the asks while the client is still happy.

- What did you deliver against the original goals, stated as value created?

- What files, logins, and instructions does the client need, and where will they live?

- What two specific questions will you ask to make a testimonial effortless to write?

- What natural next phase or referral will you gently propose, and in what words?

Checklist: Project-Close Checklist

- I sent a summary of what was delivered against the original goals
- I handed over all final files, logins, and documentation, organized in one place
- I stated clearly that the engagement is complete (no ambiguous open tail)
- I asked for a testimonial with specific, easy-to-answer questions while the glow was warm
- I named the next phase and signaled I welcome referrals and have capacity

Your Action Plan

1. Write your one-page communication agreement and add it to your onboarding or welcome packet.
2. Choose one tool for each job (email, chat, video, workspace, scheduling) and write the routing rule for which message goes where.
3. Build your weekly status update template using BLUF and RAG, and set a recurring Friday calendar block to send it.
4. Create your message template library: welcome, update, feedback request, delay, nudge, payment reminder, and close.
5. Adopt the acknowledgement reflex: confirm receipt within your response window even when the full answer comes later.
6. Set two or three daily windows to batch messages and protect deep-work blocks in between.
7. Write your delay / bad-news and de-escalation scripts now, while calm, so they are ready under pressure.
8. Prepare your calm-middle scope-pushback response so you never silently absorb out-of-scope work.
9. Design your project-close handoff plus the testimonial and referral ask, and use it on your next finish.
10. Run the whole system on your next client and review after two weeks: where did trust feel strongest and where did it slip?

