



## The Guidelines

### Setting Client Expectations

We love our clients. But unless a client is recommending our services left and right and bringing us new business on a consistent basis (we know who these clients are), we do not do extra, or free work.

To avoid overcommitting ourselves to a set of tasks that cannot be feasibly accomplished in the amount of hours a client is paying for,

**WE MUST SET CLIENT EXPECTATIONS EARLY, OFTEN, AND REVISE WHEN NECESSARY.**

## 1. Be clear

Be clear with the client during all meetings that **what you discuss and agree to during their monthly strategy call is what you will accomplish.** If they approach you mid-month with a bright idea, tell them to keep a running list of tasks to discuss in the following month.

## 2. Every once in awhile, feel free to do a client a last minute favor.

But only if you're at your desk and it will literally take you 5 minutes - DO IT. If you have done more than 2 favors and you notice that it's becoming a habit, **let 24 hours lapse before responding to a last minute request.** Apologize to the client and let them know that if this type of task is now considered recurring, and you'd love to discuss how to implement a system for it and adjust their retainer for ongoing implementation during their next strategy call.

## 3. Get into a groove with your clients that you're comfortable with

For example: Susan replies to emails in the morning and reserves the afternoons for implementing. If a client emails her during the afternoon, she opens the email to make sure that it isn't urgent. If it is - she responds immediately. If it isn't - she responds the following morning. **Unless a client has a 40-60 hour retainer, you are not on call.** You are allowed to establish boundaries that both of you are comfortable with.

## **4. DO NOT PROMISE THE SUN, THE MOON, AND THE STARS. EVER!**

Be clear to the point of alllllmost being harsh. Don't be afraid to tell a client that what they want accomplished this month will require an extra 10 hours. Don't be afraid to tell a client that wants to stick with their current retainer that you will not be able to perform XYZ for them until they are ready to renegotiate their retainer. Say it with a smile. If you make it a habit from the beginning, you establish the healthy boundaries that are VITAL to any working relationship. It's ok to say "No."

## **5. Always under-promise and over-deliver**

Never allow yourself to get flustered during a client meeting and agree to a project timeline that will cause you to lose sleep or have an anxiety attack. If you think you can get a project rolled out by Tuesday next week, let the client know that you'll have it ready for them by end of day on Wednesday. Over-promising leads to sloppy, scattered work and disappointed clients. Never put yourself in a position where disappointment is inevitable.