Client Communication Hub

Templates, strategies, and playbooks for 5X client outcomes

WORKSHOP

Reclaim Your Workweek Workshop

EVENT

Founded in FoCo 2026

PRESENTED BY

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SECTION 1

The 5 Core Templates

These templates form your communication backbone. Each is designed for a specific moment in the client journey — but they're starting points. Personalize them with 1-2 details specific to your relationship and their project.

1. Welcome Email (Day 1)

Goal: Confirm engagement, set expectations, establish tone. Sent to primary stakeholder + anyone on the project.

> TEMPLATE: WELCOME EMAIL
>
> **Subject:** Welcome to [Project Name] — Here's What's Next
>
> Hi [Name],
>
> Thanks for choosing Local Nerds. I'm excited to build [specific outcome] with you.
>
> Here's what happens this week:
> • Kickoff call: [Day] at [Time]
> • You'll receive: Project brief and initial timeline
> • We'll dive into: [1-2 specific things]
>
> One key thing: We adapt to YOUR process, not force our approach.
>
> See you soon,
> [Your Name]

Customization notes: Add 1 detail about their industry or challenge. Replace [specific outcome] with a phrase from your discovery call, not generic language.

2. Update Email (Bi-weekly or post-milestone)

Goal: Build confidence, document progress, flag blockers early. Sent to all stakeholders on the project.

TEMPLATE: PROJECT UPDATE

Subject: [Project Name] Update — Week of [Date]

[Name],

COMPLETED THIS WEEK:
✓ [Specific deliverable] — ready for review
✓ [Integration or test result] — working as expected

UP NEXT:
→ [Specific task] — starts [Date], due [Date]
→ [Deliverable] — needs input from you by [Date]

BLOCKERS: None. On track.

[IF BLOCKERS EXIST: We hit [specific blocker]. Here's our plan: [your action]. We need [from client] by [date]. This affects delivery by [X days]. Will discuss Friday.]

Reply or schedule a call if you want to discuss.
[Your Name]

Customization: Include 1 metric if available ("processed 500 records" vs "made progress"). Use checkmarks and arrows — visual scans beat walls of text.

3. Check-In Email (1-1 sync prep)

Goal: Confirm alignment before a deeper conversation. Can be a prelude to a call or a quick async touchpoint.

TEMPLATE: CHECK-IN

Subject: Quick sync — [Project Name]

[Name],
Want to hop on a quick call [Day] at [Time]? (15-30 min)
We can cover:
- How the current iteration landed (the data export piece you mentioned last week)
- Did the speed improvement match your expectations?
- Next steps so nothing gets derailed

If that time doesn't work, send a few windows and I'll find something.
[Your Name]

Customization: Reference something specific they said: "the 40-account daily logging issue you mentioned," or "the accuracy concern Sarah raised," not generic follow-ups.

4. Deliverable Handoff Email (Ready for review)

Goal: Hand off work clearly, tell stakeholders what you need from them, set review timeline.

> TEMPLATE: DELIVERABLE HANDOFF
>
> **Subject:** [Deliverable] Ready for Review
>
> [Name],
> [System/tool/process] is live and ready for your team to test.
>
> **ACCESS:** [Link + how to login]
>
> **WHAT TO TEST:**
> 1. [User path 1] — should result in [expected outcome]
> 2. [User path 2] — should result in [expected outcome]
>
> Please test with your real workflow and send back feedback by [Date].
> Common issues to watch for: [1-2 things]
>
> My role next: I'll review your feedback and deploy fixes by [Date].
> [Your Name]

Customization: Include screenshot or 2-3 bullet list of how their workflow changed. Make it easy to visualize.

5. Close-Out Email (Project complete)

Goal: Celebrate outcome, recap ROI, lock in next steps/retainer, leave door open.

TEMPLATE: CLOSE-OUT & NEXT STEPS

Subject: [Project Name] Complete — Here's the Impact

[Name],
[System/process] is live and your team is now using it. Wins so far:
• [Specific metric]: [number] (was [previous])
• [Specific metric]: [number]

NEXT: We can either:
A. Stay on retainer — I'll optimize this monthly and build next automation
B. Pause here; reach out when you're ready for the next project

My recommendation: You've got momentum. Let's lock in retainer and hit the next workflow while everything's fresh.
[Your Name]

Customization: Be specific about metrics. "You saved 8 hours/week" beats "you saved time."

SECTION 2

Stakeholder Matrix

Not all stakeholders need all emails. Use this matrix to decide who gets what, based on project type.

Quick Wins (1-2 week projects)

Narrow scope, usually 1-2 decision makers, minimal hand-offs.

Email Type	Recipient(s)	Frequency
Welcome	Primary contact + decision maker	Day 1
Update	Primary contact	Completion
Deliverable Handoff	Primary contact + team lead	Ready to deploy
Close-Out	Decision maker + primary contact	Post-launch

Workflow Automation (2-6 week projects)

Multiple teams, higher organizational impact, more review cycles.

Email Type	Recipient(s)	Frequency
Welcome	All key stakeholders	Day 1
Update	All stakeholders	Every 2 weeks
Check-In	Decision maker	Weekly or as needed
Deliverable	End users + decision maker	Each milestone
Close-Out	All stakeholders	Post-launch

Custom Apps (4-12 week projects)

Longer timeline, multiple build phases, executive oversight often required.

Email Type	Recipient(s)	Frequency
Welcome	All stakeholders + exec sponsor	Day 1
Update	All stakeholders, exec monthly	Bi-weekly to all, monthly exec
Check-In	Decision maker + sponsors	Weekly
Deliverable	End users + decision makers	Each phase
Close-Out	All stakeholders + exec	Post-launch

AI Systems (3-6 month projects)

Department-level transformation. Executive stakeholders, end users, multiple integration points.

Email Type	Recipient(s)	Frequency
Welcome	Full org + exec sponsor	Day 1
Update	End users bi-weekly, exec monthly	Ongoing
Check-In	Exec + integration leads	Weekly
Deliverable	End users + leadership	By phase
Close-Out	Full org + exec	Launch day

Automation Retainer (Ongoing)

Monthly optimization and support. Lighter cadence but sustained relationship.

Email Type	Recipient(s)	Frequency
Update	Primary contact	Monthly
Check-In	Decision maker + lead	As needed
Quarterly Review	Full stakeholders	Every 3 months

> *Rule: If someone is paying for the project or will use the system daily, they get Welcome + Close-Out + final Deliverable. Tactical updates go to hands-on stakeholders only.*

SECTION 3

Email Timing Flowchart

Different situations require different speeds. Use this to calibrate when to send email vs. call vs. wait.

Scenario: Scope Change Discovered

URGENT Scope Change (impacts timeline by 2+ weeks)

- → **TODAY:** Call or Slack the decision maker. Explain the issue, ask to discuss.
- → **TODAY (EOD):** Send email summarizing the call — what changed, why, options.
- → **Email template:** 'We discovered [thing]. This adds [days/weeks]. Options:'
- → **Next 48h:** Follow up with updated timeline + cost estimate if applicable.

NORMAL Scope Change (impacts timeline by <1 week)

- → **TOMORROW:** Send email flagging the issue. Keep it factual.
- → **Email:** 'During testing, we found [thing]. Our recommendation is [option].'
- → **Include:** What this means for timeline, your rec, and next steps.
- → Give them 24-48h to respond. Then schedule a brief call to align.

Scenario: Quality Issue or Bug Found

CRITICAL (system is broken, work can't proceed)

- → **NOW:** Call the decision maker. Be brief: 'Found an issue, can't demo Friday.'
- → **SAME HOUR:** Send email with: issue description, your plan to fix, new deadline.
- → **DAILY:** Updates until resolved. Email only if fix is 24h+ away.

STANDARD (minor, doesn't block milestone)

- → **EMAIL ONLY:** Include issue, severity (cosmetic/functional), your fix timeline.
- → Don't call unless they ask. Keep them informed but not stressed.

Scenario: Milestone Complete, Work Ahead of Schedule

EARLY DELIVERY

- → **EMAIL FIRST:** 'Got this done early. Here's what's next.'
- → Keep it short: celebrate, say what happens next, ask if they want to move up.
- → Only call if they reply asking questions.

Scenario: Waiting for Client Input

BLOCKING: You need something from them to proceed

- → **DAY 1:** Email requesting the info. Clear deadline (e.g., 'by Friday').
- → **DAY 3:** Gentle follow-up via email. Reference the first ask.
- → **DAY 5:** Call them. Say 'We're blocked — want to grab 10 min to get this sorted?'
- → **Template for Day 3:** 'I haven't heard back on [thing]. Can you send by tomorrow?'

> *Golden rule: Urgent = phone/Slack. Important = email with 24-48h deadline. Routine = low-pressure email, they respond when ready.*

SECTION 4

Difficult Conversations (Expanded)

These moments define your credibility. Lead with the truth, offer solutions, stay calm.

1. Timeline Delay

When: You discover work will take longer than promised.

APPROACH: Acknowledge + Explain + New Plan

> **Subject:** Timeline Update: [Project Name]
>
> [Name], I found [issue] during [phase]. This adds [X days]. Here's why:
> [Honest explanation — not blame, just facts]
>
> New timeline: Delivery now [new date].
> What this means for you: [Impact on their business/team].
>
> **Options:**
> 1. Stick with new date — we deliver everything on [date]
> 2. Accelerate some parts — but [tradeoff]
> 3. Descope [lower-priority feature] — deliver by original date
>
> What do you want to do? Let's talk it through.

Tone: Apologetic but not defensive. Take ownership, don't blame the client or external factors.

2. Scope Change / Scope Creep

When: Client asks for something that wasn't in the original plan.

APPROACH: Name It + Explain Impact + Offer Options

> **Subject:** Scope Question: [New Feature Name]
>
> [Name], I want to get this right. You asked for [new feature]. That's not in the original scope.
> If we add it, here's the impact:
> → Timeline shifts to [new date]
> → Cost increases by [amount] (or [hours])
> → We'll need to descope [original feature] OR extend the timeline
>
> Better idea: We can build this in Phase 2 (right after launch) for [cost/timeline].
> Why? Keeps current launch on track, gives you time to test Phase 1.
>
> Your call. Send over your thoughts.

Tone: Firm but collaborative. You're protecting THEM from project creep, not being difficult.

3. Admitting Mistakes

When: You made an error, missed something, or misunderstood requirements.

APPROACH: Admit + Take Responsibility + Fix Plan

> **Subject:** My Mistake: [What Went Wrong]
>
> [Name], I misunderstood [thing]. That's on me. Here's what happened:
> [Exact mistake — no excuses or explanations]
>
> The impact: [What this means for them].
> Here's how I'm fixing it:
> 1. [Specific fix]
> 2. [Timeline for fix]
> 3. [What changes to prevent this happening again]
>
> I take full responsibility. Let's make this right.

Tone: Direct, accountable. Clients respect people who own mistakes. This increases trust.

4. Price Increase / Change Order

When: You need to increase cost due to scope change or hidden complexity.

APPROACH: Explain Increase + Justify Value + Offer Options

> **Subject:** Cost Adjustment: [Project Name]
>
> [Name], during implementation we discovered [complexity]. Here's the situation:
>
> Original estimate: $X for [scope]
> Discovery: [Thing we didn't anticipate]
> Revised estimate: $Y for [full scope including discovery]
>
> Why the increase?
> → We underestimated [complexity]. That's partly on us.
> → You asked for [scope addition] that needs [work].
>
> **Your options:**
> 1. Pay the increase — we deliver full vision
> 2. Descope [feature] — reduces cost to $X
> 3. Extend timeline — spreads cost over 2 phases
>
> I'm recommending option 1 because [business reason]. But it's your call.

Tone: Transparent, not apologetic for the cost of quality work. Clarity builds trust.

SECTION 4 (CONTINUED)

5. Firing a Client

When: The relationship is damaging your team or you can't deliver the outcome they want.

APPROACH: Direct + Professional + Clean Exit

> ***CALL FIRST*** *(don't email this).*
> *Script: '[Name], I want to be direct with you. I don't think we're the right fit for this project anymore. Here's why: [specific issue]. Neither of us is getting the value we need.'*

> POST-CALL EMAIL
>
> **Subject:** Project Closure: [Project Name]
>
> [Name], as we discussed on our call, we've decided to close out this project.
> Here's what happens next:
> → We'll deliver [all work completed to date] by [date]
> → You'll receive [handoff docs, access, etc.]
> → Final invoice: $X for [work completed]
> → No penalties or platform lock-in — your data is yours
>
> I recommend [local alternative / competitor] for this type of work.
> It's been a pleasure working with you.

Tone: Respectful, brief. Don't over-explain. Let them go with dignity.

6. Pushing Back on Unreasonable Requests

When: Client asks for something impossible, unethical, or off-brand for your services.

APPROACH: Validate + Explain Why Not + Offer Alternative

> **Subject:** Re: [Their Request] — Alternative Approach
>
> [Name], I hear why you want [request]. The issue is [reason it won't work].
> Here's what WILL work and gets you the same outcome:
> → [Alternative approach]
> → This is actually faster/cheaper/better because [reason]
>
> Let me know if this lands differently or if you want to discuss.

EXAMPLES:

Unreasonable: 'Can you scrape competitor pricing data?'
Your pushback: 'That's not legal/ethical. Instead, let's build a competitor tracking tool that monitors public pricing from their website.'

Unreasonable: 'Can you have this done in 2 days?' (scope says 3 weeks)
Your pushback: 'Not without descoping X and Y. Here's what's possible in 2 days and what gets pushed: [list]. What matters most to you?'

Tone: Supportive of their goal, firm on the boundary. You're the expert — they hired you for judgment.

SECTION 5

3-Touch Follow-Up: Tone Calibration

You've sent an important email (proposal, deliverable, question). They haven't responded. Here's how to escalate tone while staying professional.

Touch 1: Friendly & Eager (Day 1)

Assume they're busy. You're interested, not pushy.

> **SUBJECT:** [Original subject] — Want Your Feedback
>
> [Name],
> Sent over [deliverable/proposal] yesterday. Curious to hear what you think!
> No rush, but I'd love your thoughts by [date] so we can move forward.
> Questions? Grab 15 min on my calendar: [link]
> [Your Name]

Tone signals: Exclamation mark, 'curious,' 'no rush,' calendar link. You're helping, not demanding.

Touch 2: Helpful & Concerned (Day 3-4)

They still haven't responded. Gently escalate — maybe they missed it or have a blocker.

> **SUBJECT:** Quick question on [original subject]
>
> [Name],
> I haven't heard back on [deliverable]. A few reasons I'm checking in:
> 1. If you have questions, I want to clear them up
> 2. If something's blocking you, let me know and I can help
> 3. If you need more time, that's fine — just let me know by [date]
>
> Either way, let's make sure this stays on track.
> [Your Name]

Tone signals: List format shows you're problem-solving. 'Let's make sure this stays on track' is collaborative, not demanding.

Touch 3: Direct & Respectful (Day 5-7)

Final touch. Professional concern, clear deadline, offer to unblock them.

> **SUBJECT:** Urgent: Need your input on [project] by [date]
>
> [Name],
> We're at the point where I need your feedback to move forward.
> Here's the situation: [Explain what happens if they don't respond].
> Can you get me your thoughts by [date]? If you're blocked on something, let's jump on a quick call to sort it.
> [Your Name]

Tone signals: 'Urgent' in subject (now justified after 2 emails), consequences are clear, offer to help. You're not being mean — you're being professional.

> *The rule: Touch 1 is hopeful. Touch 2 is helpful. Touch 3 is honest. If they don't respond after Touch 3, it's their choice — move on or have a conversation.*

SECTION 6

Personalization Layer

Templates are starting points. This is how you transform a template into a message that feels personal and builds relationship.

3 Personalization Rules

1. Add 1-2 personal details from your relationship.

Reference something they said on a call, a challenge they mentioned, a win they celebrated.

GENERIC vs. PERSONAL

Generic: 'We're excited to build this system for you.'
Personal (if you know they're stressed): 'I know your team's overwhelmed with manual data entry. By next Friday, that's gone.'

Generic: 'Here's the update.'
Personal (if they mentioned a specific pain): 'The script we built will cut your customer service time by the 4 hours/week you mentioned needing back.'

2. Shift tone to match your relationship.

Formal client? Respectful, clear, concise. Casual client who jokes? Match their energy.

TONE MATCHING

Formal: 'We're pleased to confirm your project timeline.'
Casual: 'Timeline's locked. Let's ship this thing.'

Formal: 'I recommend descoping Feature X.'
Casual: 'Real talk: Feature X is a distraction. Let's kill it and focus on what matters.'

3. Include 1 specific metric or detail from their project.

Not generic outcomes — their outcomes.

GENERIC vs. SPECIFIC

Generic: 'You've saved a lot of time.'
Specific: 'Your team logs 40 accounts/day now instead of 8. That's 32 more accounts, every single day. Your backlog's cleared in 10 days instead of 60.'

Generic: 'The system is working well.'
Specific: 'Proposals are generating in 15 minutes instead of 3 days. Sarah says she can now handle 2x the clients without working nights.'

SECTION 7

AI Prompts for Client Communication

These prompts help you draft, adapt, and refine client emails using Claude or another LLM. Always review and personalize before sending.

Prompt 1: Personalize a Template

```
I'm sending a project update to [Client Name]. We just [completed/fixed/delivered] [specific thing]. They're worried about [their specific concern]. Customize the update template to include 1 specific metric about their outcome and reference their concern directly. Make it feel personal, not templated.
```

Prompt 2: Draft a Difficult Message

```
I need to tell [Client Name] that [situation]. This is [urgency: routine/important/urgent]. Our relationship is [description]. Draft an email that [tone: apologetic/direct/collaborative]. Include the problem, why it happened, and [what I'm offering to fix it / what I need from them]. Keep it under [word count].
```

Prompt 3: Adapt Tone to Relationship

```
I wrote this email: [paste email]. My client [Client Name] is [description of relationship/personality: formal/casual/technical/non-technical]. Rewrite this to match their tone better, but keep all the same information. Make it feel like me, not corporate.
```

Prompt 4: Write the 3-Touch Follow-Up

```
Draft 3 follow-up emails for [situation]. Touch 1 (Day 1): Friendly & eager. Touch 2 (Day 3): Helpful & concerned. Touch 3 (Day 5): Direct & respectful. The original ask was [original message]. Include [specific detail] in each so it doesn't feel like a template. Keep each under 100 words.
```

Prompt 5: Translate Bad News into Action

```
I have to tell [Client Name] that [bad news]. Instead of just apologizing, I want to lead with what
I'm doing to fix it. Draft an email where the first sentence is my action plan, then briefly
explain what happened. Make them feel like we're solving this together.
```

SECTION 8

When NOT to Email (The Conversation Rules)

Email is efficient. But some conversations are too important, sensitive, or complex to handle over text. Here's when to talk instead.

Always Call / Schedule a Meeting When:

1. **Timeline delay (more than 1 week).** Email explains it, but the conversation sets new expectations and rebuilds trust.
2. **Price increase (more than 15%).** A call lets you explain the 'why' and explore options together. Email sounds like a bill.
3. **Scope creep (significant new feature).** Email creates a paper trail, but the call lets you understand their priority and offer alternatives without miscommunication.
4. **They're upset or confused** (you can tell from their email tone). A voice conversation de-escalates. Email can feel cold.
5. **Decision needed and they're stalled.** Call to understand the blocker. It's rarely the email itself — they're stuck on something you can't see.
6. **Firing a client or ending a relationship.** This is a respect thing. Email feels like rejection. A call is brave and professional.
7. **You've sent 2+ follow-ups and heard nothing.** At this point, a call is clearer than Touch 3 email. Say: 'Trying to reach you on [project]. Can we jump on a quick call?'

> *Meta-rule: If you're worried about how they'll take something, that's a call. Email is for confirming, updating, and documenting. Calls are for hard conversations.*

SECTION 9

Communication Cadence by Project Phase

Different phases demand different communication rhythms. Use this to set expectations at the start and keep stakeholders engaged.

Phase 1: Onboarding (High Touch)

First week. Build trust, confirm alignment, lock in expectations.

ONBOARDING CADENCE
Day 1: Welcome email to all stakeholders
Day 2-3: Kickoff call (confirm scope, timeline, success metrics)
Day 3: Email summarizing kickoff (attach scope doc, timeline, next steps)
Day 5: Check-in call or email (answer any questions, keep momentum)
End of Week 1: Quick update on initial findings (show work starting)

Stakeholder frequency: Decision makers + primary contact = 3-4 touches/week

Phase 2: Active Work (Regular Rhythm)

Weeks 2-X. Consistency over surprise. Set a predictable rhythm, stick to it.

ACTIVE WORK CADENCE
Bi-weekly updates: Every other Monday (or your chosen day)
Check-in calls: Weekly with decision maker (15-30 min)
Ad-hoc emails: Only for blockers, questions, or urgent discoveries

Stakeholder frequency: All get bi-weekly email. Decision maker = weekly call

Phase 3: Delivery (Close Touch)

Final 2 weeks before launch. Daily touchpoints, fast iteration.

DELIVERY CADENCE
Daily updates: Brief email (1 line) on status
Testing windows: Email with 'here's what to test, deadline for feedback'
Fixes & iterations: Quick turnaround — same day or next day

Stakeholder frequency: Primary contact = daily email. Decision maker = every other day

Phase 4: Post-Project (Low Touch)

After launch. Monitoring, optimization, relationship maintenance.

POST-PROJECT CADENCE
Week 1 post-launch: Touchbase call (how's it going?)
Monthly: Retainer check-in (if applicable) or performance review
Quarterly: Long-form update on usage/ROI (if retainer)

Stakeholder frequency: Decision maker = monthly. Primary contact = as needed

> *The goal: Predictability. Clients hate surprises and silence. Set the cadence in the Welcome email and stick to it like clockwork.*

SECTION 10

Metrics & Tracking

You can't improve what you don't measure. Track these communication metrics to level up your client interactions.

Email Performance Metrics

MEASURE THESE
Response time: Avg days until client replies to your email
First touch response rate: % of Welcome emails that get a response within 3 days
Update read rate: Do clients open bi-weekly updates? (if you can track)
Decision latency: How long before client approves/gives feedback?
Follow-up effectiveness: How many touches needed before response?
Clarity: Do clients ask clarifying questions? (fewer = clearer writing)

Stakeholder Satisfaction

POST-PROJECT SURVEY
Communication frequency: Did we talk enough / too much?
Clarity: Did you always understand project status?
Responsiveness: How quickly did we answer questions?
Transparency: Did we flag issues early or hide them?
Professionalism: Did our emails feel competent and trustworthy?

Simple 1-5 scale for each. Aggregate these by project type to identify patterns.

Template Effectiveness

TRACK WHICH TEMPLATES WORK
For each project: Which template got the fastest response?
Which difficult conversation template de-escalated tension?
Which tone (friendly/direct/collaborative) works best with different client types?
Which personalization details had the biggest impact on engagement?
Which follow-up sequence worked (2 touches vs 3 vs did they ghost)?

After 10 projects, you'll see patterns. Double down on what works.

Target Benchmarks

24h	**3 days**	**80%**	**1-2**
Email response time (target)	Decision turnaround (typical)	Stakeholder satisfaction rating	Follow-ups needed (avg)

SECTION 11

Cross-References & Integration

This guide doesn't exist in isolation. Here's how to integrate it with other parts of your delivery system.

Companion Materials

EMAIL TRIAGE (if you have it)
Use Client Comm Hub for: Drafting outbound, difficult conversations
Use Email Triage for: Managing inbound volume, prioritizing responses
Integration: When a client emails with a question, use triage to categorize it. Then draft response using relevant template from here.

MEETING PREP (if you have it)
Before every client call: Reference Meeting Prep to structure the agenda
After the call: Summarize in an email using the Check-In or Update template
Integration: Meetings + follow-up emails = complete paper trail and alignment

INVOICE TRACKING / PROPOSAL TEMPLATES
Proposals should match the tone of your Welcome email
Invoices should reference project phase and deliverables from your Updates
Integration: Consistent language across discovery, proposal, execution, delivery

CRM / EMAIL AUTOMATION TOOL
Store all 5 core templates in your email system (Pipedrive, HubSpot, etc.)
Set calendar reminders for cadence (bi-weekly update email, weekly check-in call)
Integration: Automation reduces friction; templates ensure consistency

How This Fits Into Your Delivery Process

1. Discovery → Send Welcome email (captures key details from call)
2. Active work → Bi-weekly Update emails on cadence
3. Blockers arise → Use Difficult Conversation template + timing flowchart
4. Milestone ready → Deliverable Handoff email + follow-up sequence

5. Project complete → Close-Out email + satisfaction survey
6. Retainer → Monthly updates using Update template with retainer-specific metrics

IMPLEMENTATION

How to Use This Hub

This isn't a document to read once and shelve. It's a working tool. Here's how to get maximum value.

Week 1: Setup

1. Copy the 5 core templates into your email system / CMS (Gmail, Notion, etc.)
2. Set calendar reminders for your communication cadence (bi-weekly update, weekly check-in, etc.)
3. Review the Stakeholder Matrix. Customize for your service types.
4. Pick one difficult conversation you're avoiding. Bookmark the relevant template section.

Ongoing: Reference & Refine

1. Before sending important emails: Check if there's a template. Adapt it, don't start from scratch.
2. Every project: Track 1 metric (response time, follow-ups needed, etc.)
3. After each difficult conversation: Note what worked. Update your mental model.
4. Monthly: Review client feedback. Did they mention communication? Update templates.

Quarterly: Audit & Evolve

1. Review all emails sent last quarter. Are you sticking to cadence? Are templates still landing?
2. Survey clients: Which communication moments were most valuable? Which felt like noise?
3. Update 1-2 templates based on learnings. Keep iteration going.

This guide is your communication playbook. Better client relationships drive better outcomes, better referrals, and happier teams. Use it relentlessly.