

Client Management

END OF MONTH SELF ASSESSMENT

What did you observe during this month that became an “index card” item, pointing you toward creating a new system or boundary?

Did you create or update your welcome packet?

Yes

No

Check everything that you’ve chosen to address in your packet:

Your evening, weekend, and holiday availability

Office Hours/Typical Response Times

Holiday/Time Off

How you communicate with clients

Emergency Policy

Other*

*Please specify:

Did you find yourself writing any canned emails to respond to or proactively address anything that commonly occurs in your business?

Yes

No

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What challenges or concerns do you continue to have with your business contract?
(circle your answers so you'll keep a list of what you still need to address)

Still Concerned **Refund Policy** Confident

Still Concerned **Cancellation or Pause Clause** Confident

Still Concerned **Set Expectations/Outlines
Consequences for Missed Deadlines** Confident

Still Concerned **Payment Terms/Expectations** Confident

Still Concerned **Written in Language Clients Can
Understand** Confident

Still Concerned **Accurately Describes Deliverables** Confident

Still Concerned **Communicates Timelines As
Appropriate** Confident

Other:

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Did you create any new timelines or communicate any new expectations around deadlines to help your clients stay on track in working with you?

Did you make any additions or improvements to your clients onboarding/offboarding processes?

Yes

No

On a scale of 1-10, how confident do you feel after focusing on improving your client management systems and experience this month?

