

# Client Management



## BEGINNING OF MONTH SELF ASSESSMENT

Do you have policies about how you communicate with your clients? Are there any ways that you do NOT communicate?

Yes

No

Write your communication preferences here:

Do you have clear “office hours” and guidelines for your business response time?

Yes

No

Have you created a holiday time off policy?

Yes

No

Do you have guidelines for communicating with your clients if you need to take a “sick day” or have an emergency?

Yes

No

Do you have a welcome package?

Yes

No

If YES, when was the last time you reviewed it for clarity and accuracy?

Date:

On a scale of 1-5, 5 being the most clear, how would you rate your business in communicating:

Office Hours/Typical Response Times: 1 ● 2 ● 3 ● 4 ● 5 ●

How you communicate with clients: 1 ● 2 ● 3 ● 4 ● 5 ●

Your evening, weekend, and holiday availability: 1 ● 2 ● 3 ● 4 ● 5 ●

# Client Management



## BEGINNING OF MONTH SELF ASSESSMENT

What challenges or concerns do you have with your business contract? (circle your answer)

Concerned

**Refund Policy**

Confident

Concerned

**Cancellation or Pause Clause**

Confident

Concerned

**Set Expectations/Outlines  
Consequences for Missed Deadlines**

Confident

Concerned

**Payment Terms/Expectations**

Confident

Concerned

**Written in Language Clients Can  
Understand**

Confident

Concerned

**Accurately Describes Deliverables**

Confident

Concerned

**Communicates Timelines As  
Appropriate**

Confident

**Other:**

# Client Management



## BEGINNING OF MONTH SELF ASSESSMENT

Where do your clients typically get stuck (ie. fall behind or miss deadlines) during the process of working with you? How can you communicate about your deadlines/timelines to account for this?

Are you happy with your current system for managing your clients onboarding and offboarding process?

Yes

No

On a scale of 1-10, chart how confident do you feel about your client management right now?

