Client Communication Cheat Sheet

Write follow-ups, project updates, thank-you notes, and prepare for tough conversations.

Prompting Tips for Client Communication

- Follow up within 48 hours of any meeting or submission.
- Always include a specific next step with a proposed date.
- For sensitive conversations, prepare talking points and anticipated pushback in advance.

Write a Follow-Up Email

Write a thoughtful follow-up after a meeting, proposal, or introduction.

PROMPT

> You are a professional communications writer helping a business owner follow up on an important interaction.
>
> Context: [type of interaction, e.g., proposal submission, introductory meeting, networking event]
> Recipient: [name and title]
> What happened: [brief summary of the interaction]
> Next step you want: [e.g., a 30-minute discovery call]
> Timeline: [when you would like to hear back]
>
> Please write an email that:
> 1. References the specific interaction
> 2. Reinforces one key value point
> 3. Includes a clear, specific ask
> 4. Proposes a concrete next step with a date
> 5. Closes warmly
>
> Keep it under 150 words. Tone: professional, warm, not pushy.
>
> If the recipient name or interaction details are not provided, write a general follow-up and note where personalization would improve it.

Write a Client Project Update

Share a clear progress update that keeps your client informed and confident in the work.

PROMPT

You are a project manager drafting a clear progress update for a client.

Project: [project name]
Client: [client name]
Reporting period: [date range]

Progress:
- Completed: [list what was done]
- In progress: [list current work]
- Upcoming: [list next steps]

Issues or risks: [any blockers or concerns, or "None"]
Decisions needed: [anything requiring client input, or "None"]

Please write a concise update email that:
1. Leads with a brief status summary (on track / at risk / delayed)
2. Lists accomplishments with brief descriptions
3. Outlines next steps with expected dates
4. Flags any items needing client action
5. Ends with availability for questions

Keep it scannable with bullet points. Under 200 words.

If progress details are sparse, structure the update with available information and note which sections need more detail.

Write a Client Project Update

Prepare for a Sensitive Client Conversation

Thoughtfully prepare for conversations about scope changes, delays, or other sensitive topics.

PROMPT

You are a client relationship expert helping a business owner prepare for a sensitive conversation.

Situation: [describe the issue]
Relationship context: [e.g., long-term client, new engagement]
Desired outcome: [what you want to achieve]
Constraints: [what you can and cannot offer]

Please provide:
1. An opening statement that acknowledges the situation directly
2. Key talking points (3-5) with suggested phrasing
3. Anticipated pushback and how to respond
4. A proposed solution or path forward
5. A closing statement that preserves the relationship

Tone: honest, empathetic, solution-focused. Never defensive or dismissive.

If the situation details are limited, provide a general framework for the conversation and note where more context would sharpen the advice.

Write a Thank-You Note

Send a genuine, personal thank-you that strengthens the business relationship.

PROMPT

You are a relationship-focused communications writer crafting a genuine thank-you message for a business owner.

Recipient: [name and title]
What they did: [specific action you are thanking them for]
Impact on you/your business: [how it helped]
Relationship: [e.g., long-term mentor, new connection from a recent event]

First, consider what would feel most meaningful to the recipient. Then write a thank-you message that:
1. Is specific about what you are thanking them for
2. Explains the real impact (not just "thanks for your help")
3. Offers reciprocity (how you can help them)
4. Feels personal, not templated

Keep it under 100 words. Tone: warm, sincere, professional.

If the impact or relationship details are brief, write the best note possible and keep it genuine rather than padding with generic praise.