

Managing Clients Email Templates

Overdue Invoice

Subject: Gentle reminder: Invoice # [xxxx]

Hi [Client]

Just a quick note to let you know that invoice number [xxxx] for [payment amount] is now due.

Please pay your invoice at your earliest convenience.

If there are any questions or concerns, don't hesitate to reach out!

Thank you

[You]

Establishing Boundaries

Subject: Feedback Loops

Hi [Client]

I really appreciate the enthusiasm you have for this subject. I'll get back to you regarding your questions/issues once I'm back in the office tomorrow.

Note: I typically work [hours].

More generally, I feel that our projects will run much smoother if we schedule a regular check-in with each other 1-2 times a week.

That way, we might be able to better organize and discuss your feedback and/or questions!

[Your signoff]

[You]

Improving Workflow

Subject: Improving Workflow

Hi [Client]

It's been a pleasure working with you so far. If you're open to feedback, I would like to suggest something which will help me deliver better quality work.

Would it be possible to brief me in on projects at least [insert number of weeks] in advance so I can plan ahead?

Generally, I know I'll provide better service and output if I know in advance what's coming next. Plus, I really want to make sure you're getting value for your money!

I understand that there will occasionally be last-minute requests, and I'll try to be flexible. But I know I'd thrive with more visibility into what's coming down the pike! Let me know if that's feasible!

[Your signoff]

[You]

“You’ve Asked for More Than We Agreed To”

Subject: Additional project work

Hi [Client]

I’d like to touch base with you about the scope of the [name of] project.

When we began, we agreed that I would [outline scope OR refer to outline/estimate]. You’ve now identified that you’d like me to also [mention the additional work].

I’m happy to do that. Here’s what it will cost: [Add hourly rate and time estimate or flat-rate for the service.]

Please let me know if you have any questions or want to give me the go-ahead to get started.

[Your favorite signoff]

[You]

Fire a Client Without Burning Bridges

Subject: Update

Hi [Client]

Thanks for the opportunity to work with you. Unfortunately, I need to scale back on some of my workload so I can maintain the high standards I aim to achieve for all my clients.

Therefore, I'll be wrapping my work with you in the next few weeks and not taking any new projects at this time.

I understand that you will need some time to find a new [insert your profession/service] so I am happy to wrap up all existing assignments within the next month.

I'd like to take a moment to express my thanks for your business. I've learned a lot working with you.

Please don't hesitate to reach out in the future!

[Your favorite signoff]

[You]