

AWKWARD CONVERSATIONS

A GUIDE FOR SMALL BUSINESS OWNERS

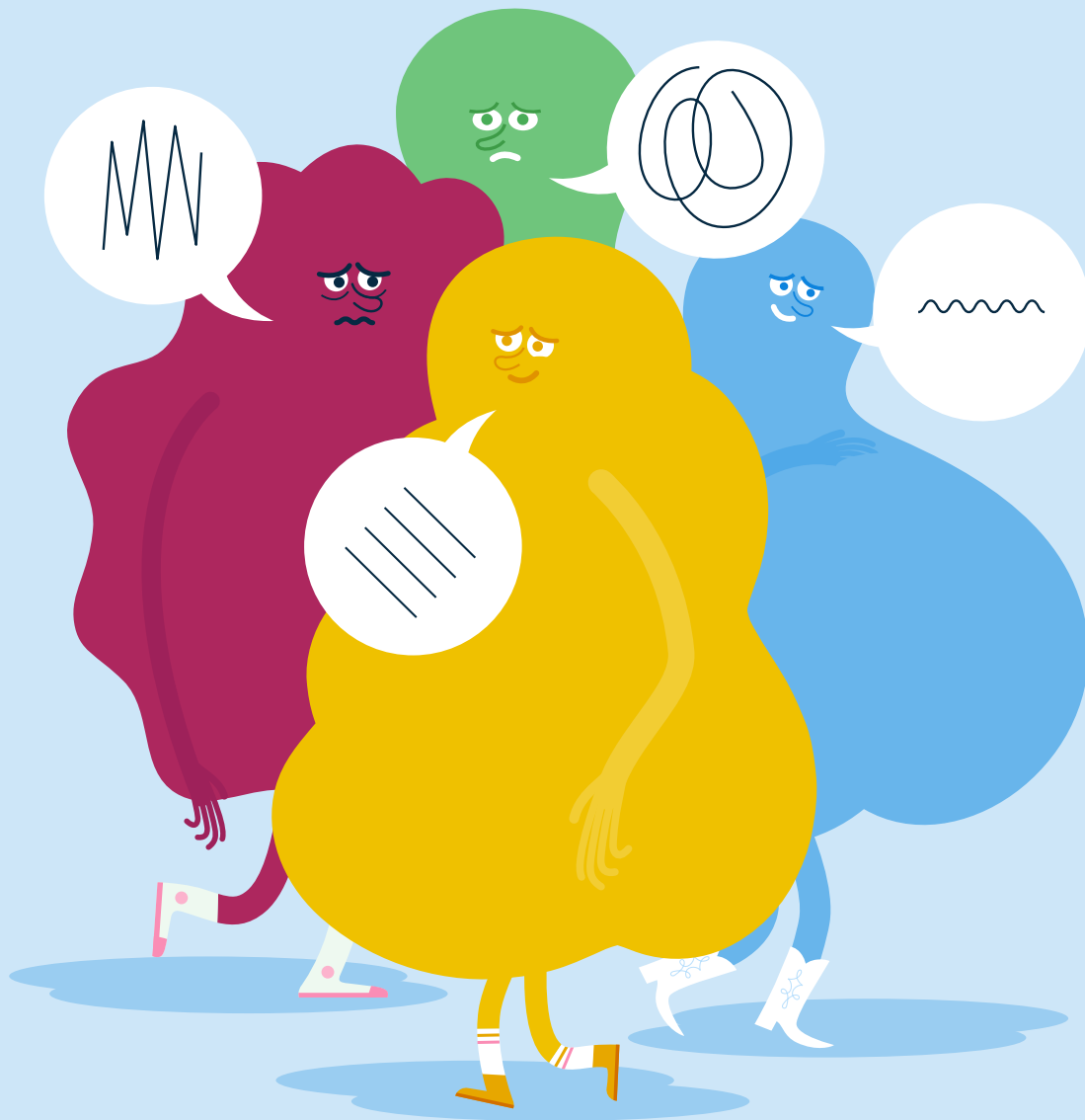
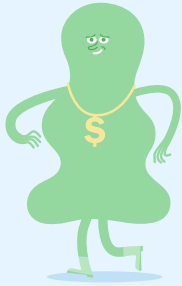


Table of Contents



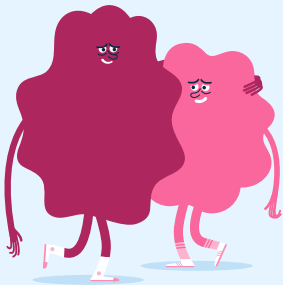
Chapter 1: Money Talk

4



Chapter 2: Project Talk

22



Chapter 3: Relationship Talk

45



Chapter 4: Marketing & PR Talk

63

WRITTEN BY:
Heather Hudson

DESIGNED BY:
Wendy Ng

ILLUSTRATED BY:
Jesse Read

Introduction

When starting out, most small business owners focus on the freedom that entrepreneurship offers. Indeed, the freedom to forge your own path is a tremendous thrill.

But with that freedom comes a whole lot of responsibility. Sales, client relationships, bookkeeping, marketing, project management (and so. much. more.) are all up to you now.

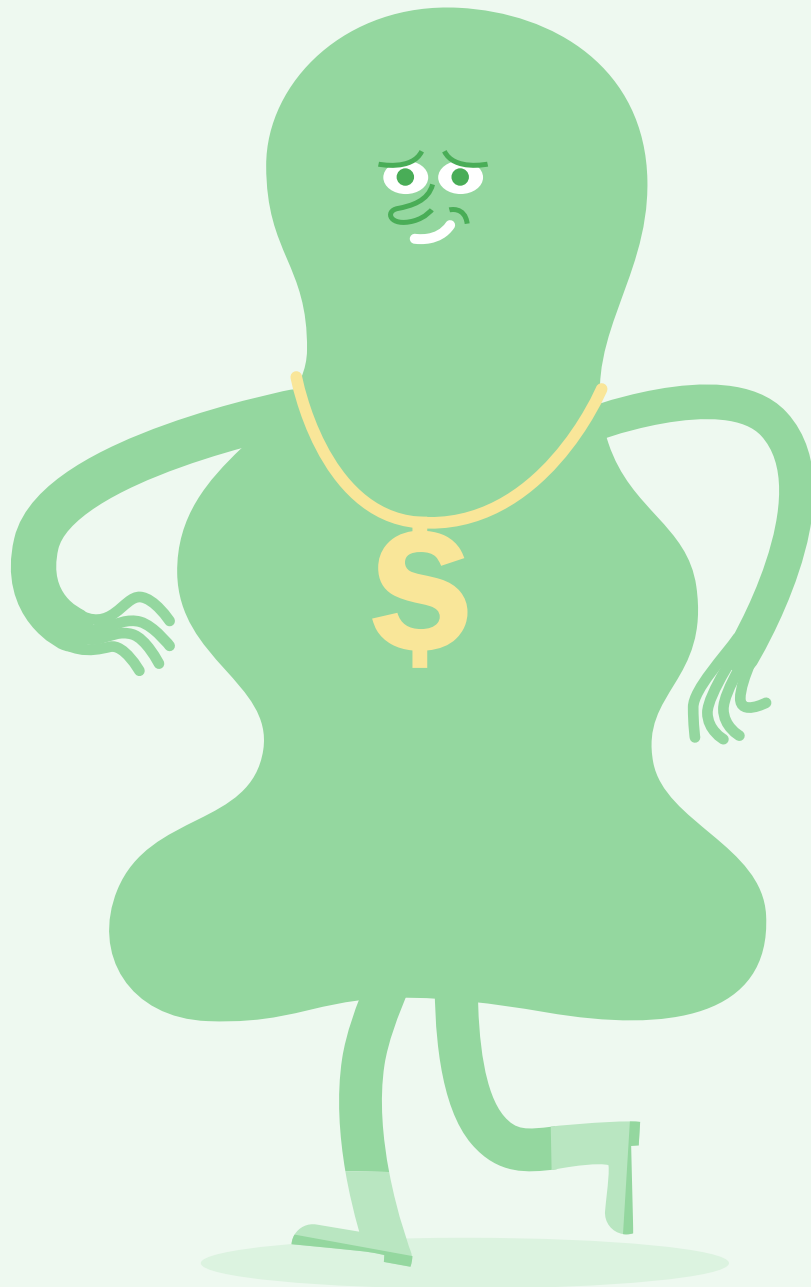
As a small business owner acting in all the roles, it might feel like you're perpetually bracing yourself for an awkward conversation (or, more likely, email or text exchange) with a client or prospective customer. Like telling your first client how much you charge or crafting that uncomfortable email to the client who's late to pay.

You want to put your best face forward, be liked and professional. But there are times when you need to assert yourself. And while tools like FreshBooks make it easy to automate some of those conversations with rinse-and-repeat templates, you still have to figure out WHAT to say.

That's where this eBook comes in. We've got 38 templates to help you address all your most awkward situations. Customize them for your business and say goodbye to those hand-wringing moments of frustration.

CHAPTER 1

MONEY TALK



Money Talk: An Overview

Let's start with the MOST awkward of all awkward conversations: Money talk. Nobody really likes talking about money, but it's something we all have to get comfortable with in order to succeed.

The best approach is to avoid apologizing for asking for what you've earned. Be concise, be clear and be confident!

TRUTH:

The more you talk about money, the easier it is to talk about money. Like most things, it gets better with practice. So don't shy away from difficult conversations!

Here are 10 templates for handling your most difficult money talks...

TEMPLATE 1:

HOW TO RESPOND TO A STRAIGHT-FORWARD REQUEST FOR RATES

Subject: My rates

Hi {Client}

Thanks for your interest in my work. I'd be happy to share my rates:

- Service 1: \$XX/hour or \$XX/unit
- Service 2: \$XX/hour or \$XX/unit
- Service 3: \$XX/hour or \$XX/unit
- {Or one catch-all hourly rate}

Some of my clients prefer a flat-rate project fee. Once I understand the scope of the work to be completed, I can provide an itemized estimate so you know exactly what the project will cost.

Please note that I adjust my rates for long-term and/or high-volume projects.

Lots of options! Let's talk about what's best for you.

{Your favorite signoff}

{You}

TEMPLATE 2:

HOW TO RESPOND TO A VAGUE REQUEST FOR RATES

Subject: New project + my rates

Hi {Client}

Thanks for reaching out. I'd love to discuss how I can contribute to your project {or 'what you have in mind' if it's more vague}.

Could we schedule a phone call or meeting to discuss the scope of the work? When I know exactly what you're looking for, I can provide you with an accurate price.

{Your favorite signoff}

{You}

TEMPLATE 3:

HOW TO RESPOND WHEN SOMEONE ASKS FOR A FREEBIE

Subject: [Re: Their Subject Line]

Hi [Client]

Thanks so much for thinking of me for this project. I'd love to help you out, but I am not able to work for free.

I'm a professional [profession] and I make my living doing work like this. If there truly is no budget for this work, I'm afraid I have to pass.

Please feel free to reach out in the future if there is another project you think would be a good fit and for which there is appropriate compensation.

Thank you in advance for your understanding,

[You]

“

I came to understand clients don't want your hours—they don't want your time. They want some sort of outcome and business result. I came to understand what those goals were and was able to deliver those in a way that was profitable to me but pleasing to them.

”



MIKE MCDERMENT

CEO of FreshBooks

TEMPLATE 4:

HOW TO RESPOND TO AN UNDER-BUDGET REQUEST

Subject: Project budget

Hi {Client}

Thanks for sharing your budget. Although it's a little lower than what I normally work with for this type of project, I have a good compromise.

Here's what I can do within your budget:

{Outline a list of services, including number of revisions.}

You'll still achieve {add the project goal} and stay within budget.

Please let me know what you think!

{Your favorite signoff}

{You}

TEMPLATE 5:

HOW TO COMMUNICATE YOU'RE CHANGING YOUR RATES

Subject: Update: New rates

Hi {Client}

It's been a pleasure working with you {and your team} over the past {X months/years}. I appreciate your business and value our professional relationship.

I'm proud to say that I'm consistently building on the level of skill, experience and service I bring to every project. It's important that my rates reflect the increased value I offer to all my clients. Plus, like you, I live in a world where the cost of business is always rising.

As of {date}, I will be raising my hourly rate from \$XX to \$XX.
{Include new rates per each service, if appropriate.}

Since I love working with you, I'm happy to extend my existing rate for any work you book now through {rate increase date}—even if you don't need it until after the date passes. Let me know if you'd like to set up a call to discuss.

Thank you in advance for your support. I look forward to our continued success together.

{Your favorite signoff}

{You}



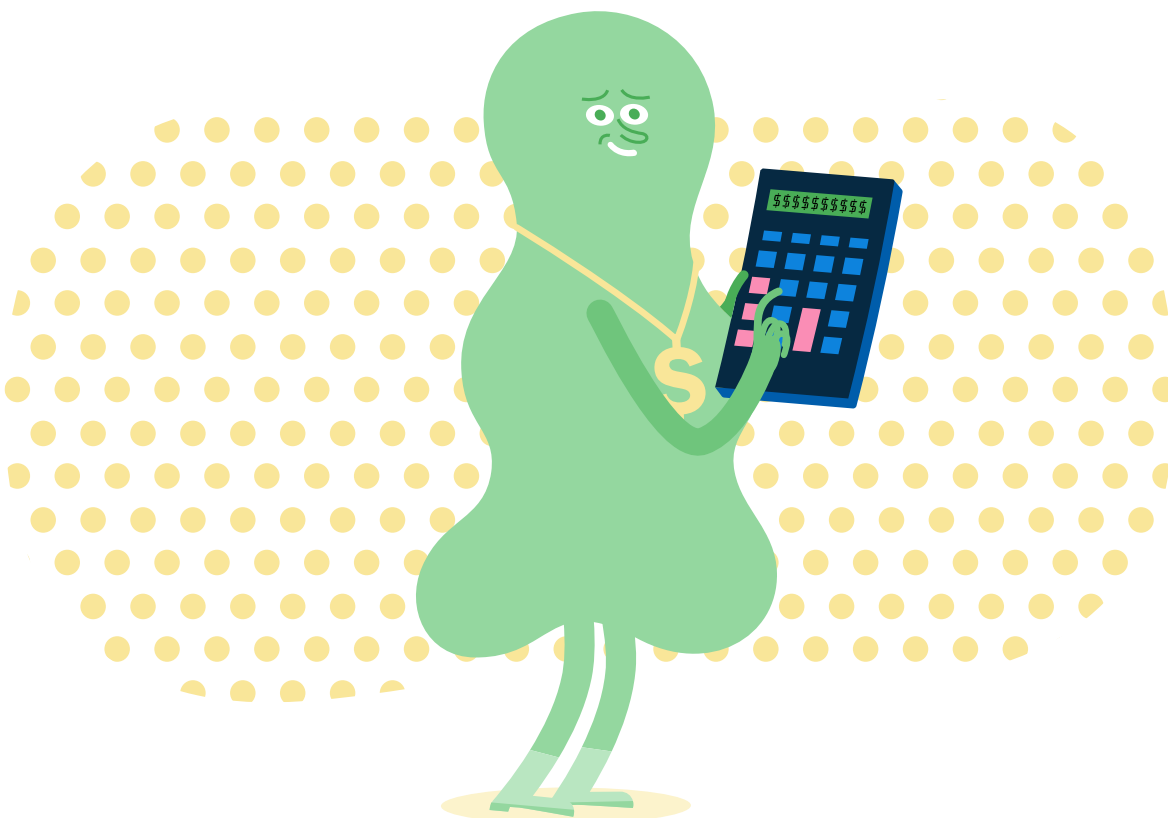
You Know It's Time to Raise Rates When...

- 
- › Other small business owners with the same (or less) experience charge more
 - › You've developed more strategic experience and specialized skills
 - › You have more work than you can handle
 - › Your clients don't flinch when you state your rate
 - › Your cost of doing business (supplies, equipment) has increased
 - › You offer a niche service with few competitors
 - › You don't feel that your clients respect the value you offer
-



Ways to Soften the Blow When Raising Your Rates

- › Phase in current clients over time
- › Highlight the value of your raised prices
- › Offer fair warning
- › Don't change your rate mid-project
- › Move up incrementally
- › Provide an incentive for booking new work



TEMPLATE 6:

LATE PAYMENT REMINDER: 5 DAYS OVERDUE

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}

TEMPLATE 7:

LATE PAYMENT REMINDER: 30 DAYS OVERDUE

Subject: Late payment reminder: Invoice # {xxxx}

Hi {Client}

Just following up again on invoice number {xxxx} for {payment amount}.

It is now 30 days overdue. Please pay your invoice as soon as possible. If payment has been made already, let me know!

Thank you

{You}

TEMPLATE 8:

LATE PAYMENT REMINDER: 60 DAYS OVERDUE

Subject: Invoice # {xxxx} OVERDUE

Hi {Client}

Per my two previous emails, I'm still waiting for payment on invoice # {xxxx}.


I would appreciate it if you could make payment by {payment method} by end of day today and reply confirming payment is en route.

Thank you

{You}




One Way to Avoid the Conversation



A good cloud accounting solution like FreshBooks will take care of the unpleasant follow-up with a Payment Reminder feature.

It lets you:

- › Set up incremental payment reminders—an email is automatically sent to clients
 - › Send a clear and consistent message
 - › Track your payments and outstanding invoices
- 

It even allows customers to pay straight from the reminder—with one click!

TEMPLATE 9:

HOW TO INFORM A CLIENT YOU'RE CHANGING YOUR PAYMENT METHOD

Subject: Update: New payment method

Hi {Client}

I'm writing to let you know that I'm offering a new and more convenient way for you to pay your invoices.

To date, you've always paid by {cash/check/e-transfer/credit card, etc.}. How would you like to pay by {cash/check/e-transfer/credit card}?

{List at least one way this payment method is better for them, e.g. 'With online payments, you can click "Pay" straight from my invoice so paying me never has to go on your to-do list. Plus, you can use your favorite credit card and collect those valuable points.'}


I hope this new method of payment works for you. I'm happy to discuss the change anytime.

{Your favorite signoff}

{You}




Online Payments Are Where It's At



If you want to be paid quickly—and make it super convenient for your clients to pay you—consider accepting online payments. Studies show you'll get paid 11 days faster!

Yes, there's a transaction fee associated with accepting credit card payments, but a quick payment often outweighs the cost.

FreshBooks allows your clients to pay by FreshBooks Payments, Stripe, credit or debit card, bank transfers and e-checks. And when you're being paid through your cloud accounting platform, it's easy to keep track of who's paid and when.



TEMPLATE 10:

HOW TO REQUEST A REIMBURSEMENT FOR EXPENSES

Subject: Additional project expense

Hi {Client}

Just dropping a line to give you an update on the {description} project.

Things are going great! {Add a detail about the project that demonstrates an exciting aspect of its success, e.g. 'I'm ahead of schedule on the illustrations and I think you're going to be really happy with the results.'}

I would like to flag that an unexpected billable cost has come up. In order to do {name the task}, I need to purchase {item} for {price}. I believe the {item} will {provide the benefit of using it}.

I won't purchase it until I get a go-ahead from you. Please let me know if you'd like to discuss further.

Thanks!

{You}



FreshBooks Turns Invoicing Lemons into Lemonade

Make billing less painful with FreshBooks
cloud accounting.

Get Started for Free



CHAPTER 2

PROJECT TALK



Project Talk: An Overview

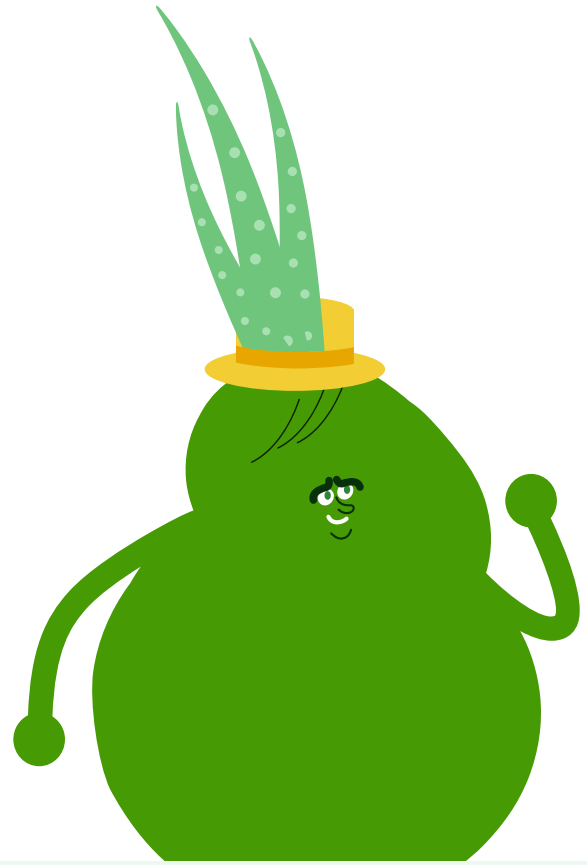
Working with clients is kind of like gardening—you need to provide the right conditions for the final product to flourish.

The catch: Not all plants (clients) are created equal. Some need lots of TLC, others want to be left alone. It takes wisdom and experience to know the difference.

Read on to learn about the 3 main kinds of clients and how to handle them!

3 Most Common Types of Clients

1. ALOE CLIENT



CHARACTERISTICS

- › Robust
- › Hardy
- › Doesn't require a lot of care

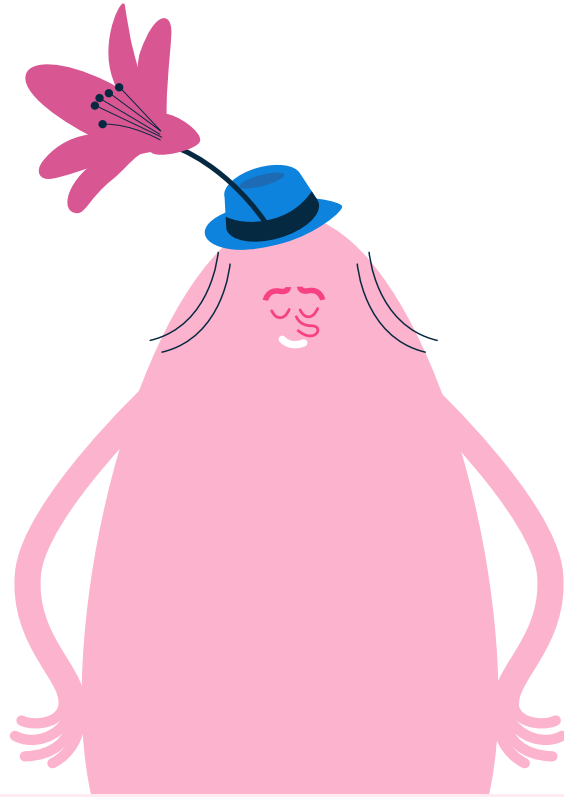
BENEFITS

Utility! Like the aloe (both pretty and healing), these clients can be useful. They pay on time and provide valuable referrals to your business.

CARE

Give them high-quality work, respond to their occasional calls or emails promptly, meet their deadlines and they're happy.

2. LILY CLIENT



CHARACTERISTICS

- › Finicky
- › High maintenance
- › Anxious or mistrustful

BENEFITS

Beauty! These clients can be worth all the bother because you get to do some of the most rewarding work.

CARE

Carefully manage their expectations and provide regular updates and reassurance to get the most out of their projects.

3. WEED CLIENT



CHARACTERISTICS

- › Take advantage
- › Monopolizing/domineering
- › Mean/scrounging

BENEFITS

None! Either convert these clients to aloes (find some use for them) or lilies (enjoy the work you do for them). If they can't be changed, rid yourself of them!

CARE

Projects require constant vigilance to fend off scope creep while meeting their expectations.

YOU: THE GARDENER

You create the conditions for growth with responsive customer service, high-quality work and ongoing communication.



TEMPLATE 11:

A WAY TO SAY "YOU'VE ASKED FOR MORE THAN WE AGREED UPON"

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 {name 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}

TEMPLATE 12:

AN ALTERNATIVE APPROACH

Subject: {Re: Their Subject Line}

Hi {Client}

Can we do a quick check-in about the {name of} project?

Before we got started, we outlined what services would be included for the {\$XX price}. I'm afraid {XYZ request OR more than XX revisions} falls outside the scope of the project we agreed upon.

I'd be happy to {do the work}, but I will need to charge you my standard rate for it.

Please let me know if you'd like to discuss this. Otherwise, I will dive in!

{Your favorite signoff}

{You}



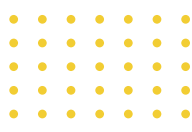
Stop Scope Creep Before It Starts with Estimates and Proposals

Get on the same page with your client by putting together an estimate or proposal for a project from the outset. They typically include:

- › A breakdown of the work you plan to do, including the number of revisions
- › How long it will take to complete
- › How much you think it will cost

PRO-TIP:

The FreshBooks Estimates and Proposals tools allow you to create a professional-looking document from an easy-to-use template. Send it to your client, edit it based on their feedback and even convert it into an invoice when the project is complete—all from one place!



HOW TO ASK FOR DIFFERENT CONTRACT TERMS AT THE START OF A PROJECT

Subject: Contract terms: Some questions!

Hi {Client}

I'm excited to get started on the {name of} project.

Just {number} thing{s} to flag before we do:

- {Example: The contract that you sent me stipulates that (e.g. the scope of the project includes three rounds of revisions). I would like to amend that to (e.g. two rounds of revisions)}
- {Example: The terms state full payment is due upon delivery. Can we change that to the following payment schedule (insert payment schedule)}
- {Example: The non-compete clause says I cannot provide the same service for a competitor for 5 years. Can I get a complete list of who is considered a competitor?}

Can we make that {those} change{s}?

I'll wait to hear from you before I proceed.

Thanks,
{You}

TEMPLATE 14:

HOW TO NEGOTIATE A NON-COMPETE CLAUSE

Subject: Non-compete clause

Hi {Client}

Looking over the contract, I came across a non-compete clause that I'd like to discuss.

I'm sure you can appreciate that I do {type of work} with many clients like you and I'd rather not restrict potential opportunities for my business.

- {Note: Make sure you and the client have the same "competition" in mind. If you're unsure ask them to clarify who they consider competition}
- {You can also negotiate the time-frame of the non-compete clause, e.g. (12 months instead of 5 years)}

If you'd like to negotiate an exclusive agreement, I'll need to secure a certain volume of work throughout the year. I'd be happy to discuss a retainer arrangement if you'd like.


I'm happy to set up a call to discuss!

{Your favorite signoff}

{You}



How to Read a Contract



As painful as it may be to read these documents, it's important to at least scan them to be sure you're not agreeing to forgo expenses related to projects or signing away a portion of your profits if the client is displeased.

If something really confuses you, consider asking a lawyer or another professional in your industry who has experience with these documents.

There will usually be a section called Services, in which the scope of the work is described. Read this carefully and compare it to your understanding of the project and/or the estimate you prepared.

Sometimes items are omitted, miscommunicated or their standard terms are not yours. Clarify with your client if you're unsure.



TEMPLATE 15:

WHEN YOU HIT A SNAG WITH THE WORK

Subject: Project progress

Hi {Client}

I'd like to update you on the {name of} project!

Things are going very well with {pick an aspect}, but I've experienced a setback with {XX}.

{Clearly and succinctly explain what this means, e.g. the project will be delayed by X days.}

Here's my plan to get us back on track: {Explain what you'll do...}

Please let me know if you have any questions as we move forward.

{Your favorite signoff}

{You}

TEMPLATE 16:

WHEN SOMETHING UNFORESEEN COMES UP IN YOUR LIFE

Subject: Project delay

Hi {Client}

Sadly, something unforeseen has come up in my personal life and I need to take some time off to handle it.

{Note: depending on your relationship with your client, you may choose to provide more information, but don't feel you have to.}

I'll be away from the office for {xx} days.

I was going to deliver the project to you {date}. Is {date} okay instead?

Thanks in advance for your understanding,

{You}

“

When you're working for yourself and real life throws a curveball your way—whether it's staying up all night with a sick kiddo or flying across the country for a death in the family—it can feel awkward to tell your clients what's up. But here's the deal: we're all human and most people are understanding when it comes to real life roadblocks. Keep it short and simple but also professional by adjusting the project timeline and expectations accordingly so your client knows that even with a hiccup they're still in capable hands.

”



KATHLEEN SHANNON + EMILY THOMPSON

Being Boss

TEMPLATE 17:

HOW TO NUDGE A CLIENT WHEN THEY'RE CAUSING A DELAY

Subject: Project delay

Hi {Client}

Things are going well with the {XX project}.

I just wanted to flag that I'm still waiting for {XX information}. Unfortunately, I'm not able to proceed without this information, so if you could provide this ASAP that would be a tremendous help.

If I don't hear from you in the next couple of days, the timeline might need to be adjusted.

Do you have an ETA?

{Your favorite signoff}

{You}



Be Clear About Timelines from the Outset

If you've been in business for any length of time you've probably encountered the "hurry up and wait" client.

Part of outlining the scope of the project should be clear deadlines for all phases of the project. For example:

- › Client sends supporting documentation: April 21, 20XX
- › First draft to client: April 30, 20XX
- › Client provides feedback: May 6, 20XX
- › Second draft to client: May 10, 20XX

Sometimes clients don't have a definitive end date for a project. It's your job to put a deadline on it. After all, the sooner it's completed, the sooner you'll get paid for it and move on to your next project!



TEMPLATE 18:

HOW TO HANDLE "TOO MANY COOKS IN THE KITCHEN" PROVIDING FEEDBACK

Subject: Coordinating feedback

Hi {Client}

I understand you may have to circulate the {project/
document} to get feedback from several people.

To make this process more efficient, could you please consolidate the comments and send it in one document? That will help me in case some of the feedback includes mixed messages!

{Your favorite signoff}

{You}

TEMPLATE 19:

HOW TO DEAL WITH CLIENTS WHO SECOND GUESS YOUR EXPERTISE

Subject: Revisions

Hi {Client}

Thanks for the honest feedback on {name project}. I see what you're thinking. You want {insert what you believe they want, e.g. 'your clients to recognize the logo and neon orange will definitely achieve that'}

Here's the logic behind my suggestion: {Insert explanation}.

Let me know what you think. If you still want to proceed in a different direction, I'm happy to take your lead. I could have the revisions to you by {date}.

{Your favorite signoff}

{You}

TEMPLATE 20:

HOW TO RESPOND WHEN A CLIENT ASKS YOU TO DO SOMETHING OUTSIDE YOUR EXPERTISE

Subject: Thank you—and referral

Hi {Client}

Thank you for thinking of me for this project. As much as I'd love to help, unfortunately {type of work} is not in my wheelhouse...

{Happily, I know someone who would be great at it! Would you like me to connect you by email?}

OR

{I'll definitely keep an eye out for somebody who could help you with this kind of request!}

{Your favorite signoff}

{You}

TEMPLATE 21:

HOW TO ASK FOR FEEDBACK AFTER A PROJECT IS DELIVERED

Subject: Thank you—and feedback request

Hi {Client}

It was a pleasure working with you on the {XX} project. I received your payment. Thank you.

I hope you were happy with the {deliverables, etc.} and that we can work together again. If you have any feedback (good or bad!), I'd love to hear it.

I look forward to connecting again in the future.

{Your favorite signoff}

{You}



Scope Creep is Creepy


Dodge it with FreshBooks

Try It Free






How To Write a Quick, Smart Satisfaction Survey



There's a streamlined way to find out what your clients really think about your work: The customer satisfaction survey (CSAT).

Putting together a quick survey using polling software like Survey Monkey is a helpful tool that clients can use to share feedback. It feels less intimate and time-consuming than penning an email. And when you've got a CSAT ready to go, there's no excuse to not include it in every "Thank you for your payment" email.

SURVEY TIPS:

- Keep it short (5 questions max)
 - Make each question optional
 - Avoid yes or no questions (use "why" and "how" questions)
 - Use the third person in your questions
- 

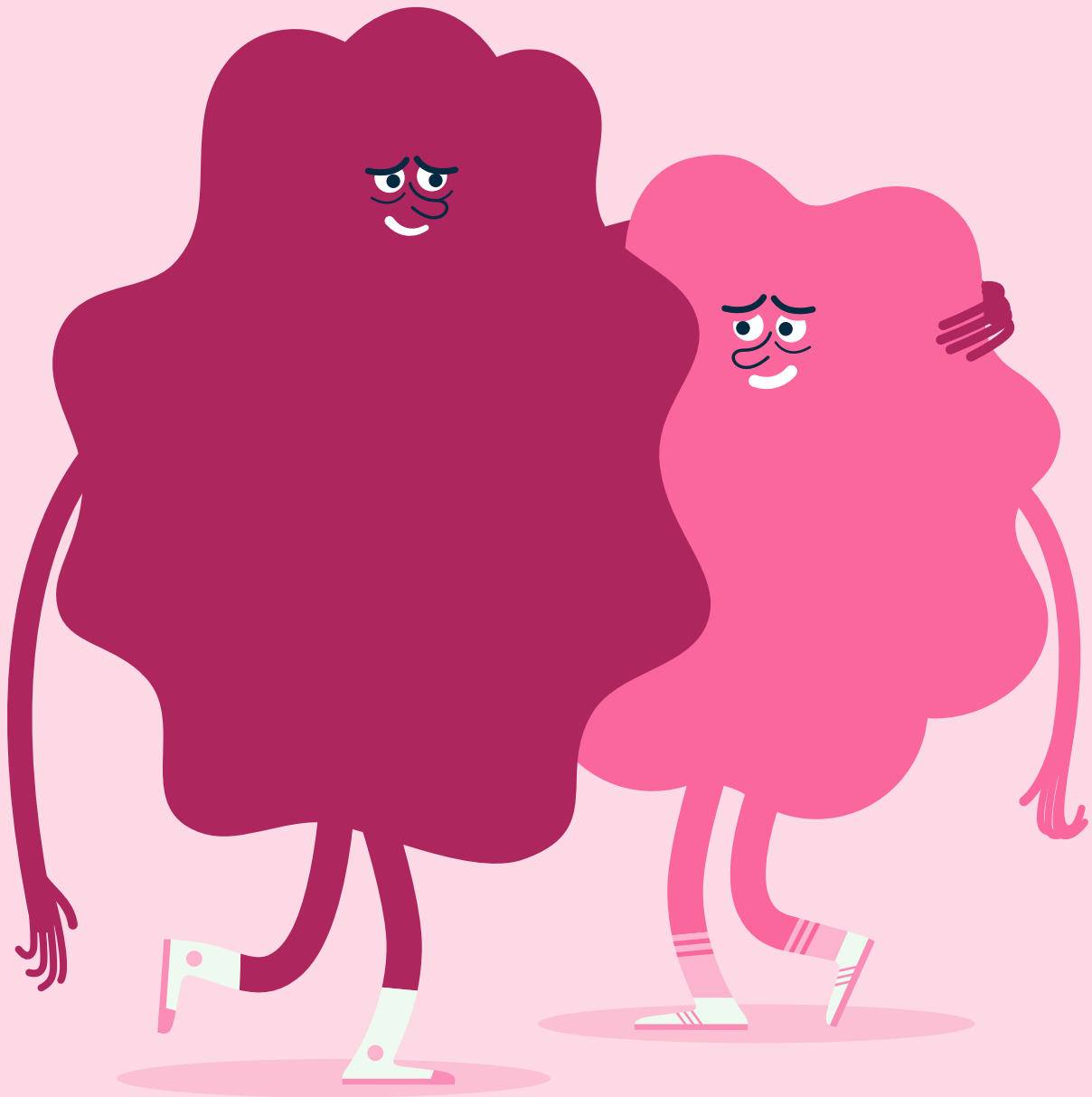
TEMPLATE 22:

CSAT TEMPLATE

1. Why did you choose [Name of business]? What solution did they provide?
2. Which of the following words would you use to describe their services? (Check as many that apply.)
 - Good value for money
 - Unique
 - Useful
 - Overpriced
 - Ineffective
 - Unreliable
3. How likely is that you would recommend [Name of business] to a friend or colleague? (Scale of 1 through 10).
4. What were the benefits of working with [Name of Business]?
5. What can they do to knock your socks off the next time you work together?

CHAPTER 3

RELATIONSHIP TALK



Relationship Talk: An Overview

When you went into business you probably didn't consider that you'd be forming dozens, if not hundreds, of new relationships.

Some of them are fleeting—characterized by only an email exchange or two—others evolve into longstanding alliances that verge on friendship.

No matter how you think of them, the people behind the payments are important figures and you share a relationship—of sorts. And when you're in a relationship, you have to nurture it!

TEMPLATE 23:

HOW TO COLD PITCH A NEW CLIENT

Subject: {Name your professional services, e.g. Freelance graphic designer, Landscaper extraordinaire, PR firm for hire} with ideas for you

Hi {Client}

I'm a {state your profession} and I {came across your work OR a mutual connection suggested I get in touch. Add a detail about them, e.g. 'Congratulations on being named Seattle's best new office supply store' OR 'The work you did on the XYZ project is truly impressive.'}

I wonder if you might need assistance with {the type of work you do}? I {insert 2-3 sentences about the services you provide that directly relate to the work they do}.

Could we set up a phone call to chat about how I might give you a hand?

{Your favorite signoff}
{You}



Dos and Don'ts of Cold Pitching

<i>Do</i>	<i>Don't</i>
Be clear and concise.	Write a lengthy email that covers all of your accomplishments.
Do your research by visiting their website or finding the person you're targeting on LinkedIn.	Pick a company you'd like to work with and wing it.
Personalize every email to the business and the recipient.	Create a pitch email template and blast it to a bunch of prospects.
Demonstrate that you understand their business, including specific opportunities or pain points.	Focus only on yourself.
Provide a link to your website, specifically to samples that relate to the work you would do for them.	Send a number of attachments, such as your CV or PDF samples of your work.
Try to find a mutual connection to introduce you.	Email blind, if you can help it.

“

I love cold pitching. You never know who you are going to connect to, and what business relationships you can build. Sure referrals and customers that find you are great, but you have to be willing to get out of your comfort zone to make your service or product known.

”



ERIN BAGWELL

Director of ‘Dream, Girl’ Film

TEMPLATE 24:

HOW TO FOLLOW UP ON A PITCH EMAIL

Subject: Following up: {original subject line}

Hi {Client}

I reached out to you last week about {include what you can do for them as per your original cold pitch email}.

Could we schedule a call to discuss how I can help you {e.g. market to your customers/improve your sales materials/enhance your website, etc.}?

Please let me know when would be a good time to connect.

{Your favorite signoff}

{You}

TEMPLATE 25:

HOW TO CRAFT A GENERIC DECLINE OF A CLIENT OR PROJECT

Subject: Thanks for thinking of me!

Hi {Client}

Thanks so much for reaching out about the {project name} opportunity. I'm grateful to be considered.

Unfortunately, I'm {e.g. swamped right now/afraid it's not a good fit for my skills/afraid the budget is on the lower end for where I'm at right now}.

{However, I do know someone who would do a great job and would be a pleasure to work with. Would you like me to make an introduction?}

OR

{I'll definitely keep an eye out for somebody who could help you with this kind of request!}

{Your favorite signoff}

{You}

TEMPLATE 26:

HOW TO RESPOND WHEN FRIENDS AND FAMILY ASK FOR FREE WORK

Subject: Thanks for thinking of me!

Hi {Friend/Family}

Great news on the {project they're working on}! As much as I'd love to help out, I'm afraid I can't give away my professional services for free.

{However, we could put our heads together to come up with a reasonable budget for the work you'd like me to do.}

OR


{However, I do know someone who would do a great job and would be a pleasure to work with. Would you like me to make an introduction?}

Let me know what you decide!

{Your favorite signoff}

{You}


Why It's Important to Say No Nicely




It might be tempting to ignore or dash off a terse response to a request for work that doesn't interest you. Don't do it. Remember the relationships. Every client matters.

A client with a small budget or a crummy project now may move on to another organization where there are bigger and better projects. If you treated them with courtesy when they were on their way up, they'll remember you when they've arrived.

And don't forget to spread the work around! If a project isn't a good fit for you but you think it would be appropriate for someone else, exercise your humanity and practice good customer service by sharing the opportunity in your network.



WHEN TO SAY NO:

- The budget is too low to be worthwhile
 - The client is a pain
 - You're too busy to take on anything else at the moment
 - The project isn't a good fit for your skills
 - You're not interested in doing that type of work
- 

TEMPLATE 27:

HOW TO NUDGE YOUR CLIENT WHEN THEY HAVEN'T SIGNED YOUR AGREEMENT, ESTIMATE, PROPOSAL

Subject: Follow up: {document} for {name project}

Hi {Client}

I'm following up on the {estimate/proposal} I sent you on {date}.

Have you had a chance to review it? I'd love to set up some time to answer any questions you might have or discuss next steps.

Happy to take the lead on setting up a meeting so we can move this forward!

{Your favorite signoff}

{You}

TEMPLATE 28:

HOW TO WARN CLIENTS THAT YOU'RE TAKING TIME OFF

Subject: Vacation dates

Hi {Client}

I just wanted to let you know that I'll be {out of the country/
travelling/taking some time off} between {date} and {date}.

I'll be wrapping up {A, B, C} before I go and will pick back up
{X, Y, Z} upon my return on {XX date}. As I'll be completely
incommunicado, please let me know if there's anything
you'll need while I'm away!

{Your favorite signoff}

{You}

TEMPLATE 29:

HOW TO MANAGE TIME OFF WHEN CLIENTS ARE HOUNDING YOU

Subject: Autoreply: Out of Office

Hi there.

Thanks for reaching out. Unfortunately I'm out of office at the moment, taking some much-needed vacation time.

I'll be back on [date] and will respond to your email upon my return.

[Optional, if you have delegate: In the meantime, if your query is urgent, please reach out to Jane Doe.]

[Your favorite signoff]
[You]

TEMPLATE 30:

HOW TO RE-ENGAGE A FORMER CLIENT FOR NEW BUSINESS

Subject: Checking in

Hi {Client}

It's been awhile since we've connected. I really enjoyed working with you on {name project} and I wanted to see how you're doing. {Ask a question about something that you remember about their role or work.}

These days, I'm working on {name a few favorite things}. If you need help with anything like this, I'd love to work with you again.

I hope you're doing well!

{Your favorite signoff}

{You}

TEMPLATE 31:

HOW TO RE-ENGAGE A FORMER PROSPECT FOR NEW BUSINESS

Subject: Checking in

Hi {Client}

It's been awhile since I bid on the {name of} project. How did it go? Great, I hope!

I'm sorry we didn't get a chance to work together that time, but maybe there will be a better time in the future. Lately, I've been focused on {name a few things}.

If any of that sounds interesting to you, I'd love to discuss and explore if there's another opportunity to work together!

{Your favorite signoff}

{You}



Stand Tall

Accounting that makes you look good.

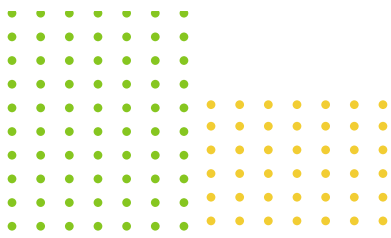
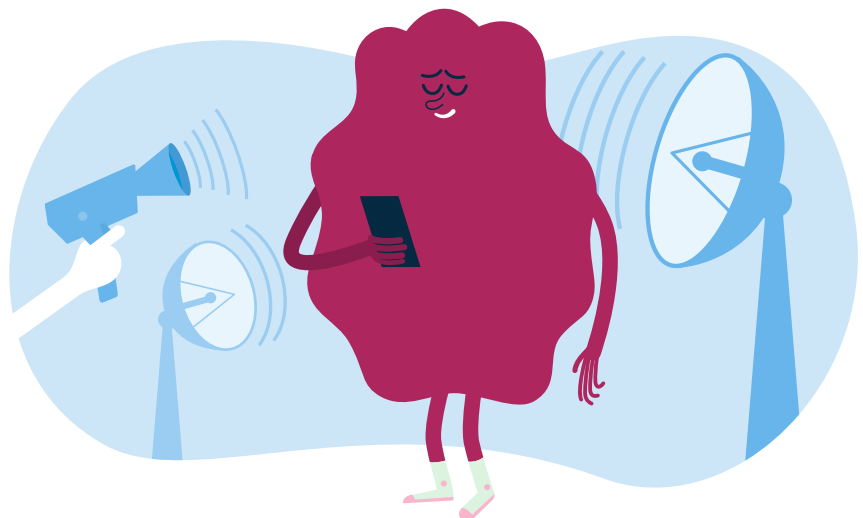
[Start My Free Trial](#)



The Importance of Staying on Their Radar

The greatest place to get new business is from old business. Don't let the effort you made finding a new client go to waste. Even if it didn't work out the first time, it's still worth keeping the contact alive.

- › Send them a short, friendly email every few months
- › Send them something useful, like a report, study or other resource related to their business
- › Keep an eye on their work and look for an opportunity to slide yourself into their current strategy/goals
- › Be active (and professional) on LinkedIn and Twitter



TEMPLATE 32:

HOW TO ASK SOMEBODY TO BE YOUR MENTOR

Subject: Mentor

Hi there. I'm reaching out because there's something I'd like to ask you. (This sounds ominous, but it's not, I promise!)

I've always been an admirer of your work, but also of the way you conduct yourself professionally. [Add a detail, e.g. You're so warm and generous with your expertise.] I wonder if you would consider acting as a mentor for me?

Could I take you out for coffee once a month and/or schedule a phone call to go over professional questions I might have? Of course, I would aim to be respectful of your time. I would be prepared for our talks and ready to listen.


If this sounds like something you'd be willing to consider, please let me know.

[Your favorite signoff]

[You]




How To Get the Most Out of a Mentoring Relationship



Do you have a mentor? Someone you admire who's been in the business longer, has seen it all and is willing share their hard-earned life lessons? If you don't, you should.

Be aware that not everyone will want to be in a mentor/protégé relationship. It takes time and commitment. All you can do is ask politely and hope for the best. Before you begin working with someone, be sure to reflect on what you most want to know and discuss. It's important to be respectful of their time. As you know, it's precious.

SUGGESTED QUESTIONS:

- What's the most effective daily habit you possess?
 - How do you define success?
 - What values are you committed to that you would never compromise on?
 - Name your most challenging client/project and how you overcame it.
 - How do you find new business?
 - How often do you prospect?
- 

CHAPTER 4

MARKETING & PR TALK



Marketing & PR Talk: An Overview

Not only are you great at what you do, you're extremely skilled at delivering your work in a customer-friendly way.

But how many people know this about you? How do you get the word out about your super powers? A good marketing plan will broadcast your abilities so the right work lands in your lap.


If there's one thing that many people find **most** awkward, it's selling themselves! The following 6 templates will make that a cinch!

NOTE:

Some of the templates in this chapter aren't quite 1:1 conversations, but ways to amplify your brand's message to the world!



How to Write a Mission or Positioning Statement for Your Business




Successfully marketing yourself starts with being clear about who you are and how you stand apart from your competition. Although you might not share your positioning statement publicly, writing one is a good exercise to help with your marketing efforts.



MY BUSINESS IS...

For [target customer] who
[need/pain point], [service] is a
[solution] that [benefit]. Unlike
my competitors, [service] is
[unique differentiator].



TEMPLATE 33:

HOW TO ASK A CLIENT FOR A TESTIMONIAL/RECOMMENDATION FOR YOUR WEBSITE

Subject: Testimonial

Hi {Client}

It was such a pleasure to work with you on {project}. I hope you were pleased with what we accomplished together!

I wonder if you might write a testimonial {or LinkedIn recommendation} for me? As you know, people respond to positive reviews. I think it would help me get the word out to other great clients like you.

{Your favorite signoff}

{You}

TEMPLATE 34:

HOW TO WRITE AN ABOUT ME BIO

{Name} is a {adjective} {profession} who works in {city, state, country}. She specializes in {specialities} and has worked with brands like {brand, brand, brand} and others. {Name} has {quirky, cool tidbit that's somewhat relevant}. Check out her work at {domain}.


EXAMPLE:

Jenna Smith is an award-winning photographer with a studio in Cannonford, CT. She specializes in commercial photography and has worked with brands such as Campbell's Soup, Chiquita Bananas and Froot Loops. Jenna has a collection of vintage lenses that is the envy of photographers the world over. You can check out her work at jennatakespics.com.



The Importance of an About Me Page and Bio

Every business owner needs a few versions of a bio or About Me saved on their desktop to:

- 
- › Go on your website
 - › Accompany collaborations with other businesses
 - › Give to media if you're interviewed or your business is being profiled
 - › Be placed at the bottom of any article you write

It's not a bad idea to memorize at least one of them and they can come in handy for elevator pitches.

BEST PRACTICES:

- Tailor to your audience
- Explain how you're different
- Be personable
- Include a link
- Be brief



When You Need Brand CPR

We really hope that you never find yourself in need of the following templates. They cover situations that are the worst fear of business owners of any scale: The PR nightmare or customer service debacle.

Each situation is unique and should be handled with the appropriate:

- › Seriousness
- › Tact
- › Sensitivity

The following templates offer a jumping off point to be tailored to your situation.

TEMPLATE 35:

HOW TO RESPOND TO A SOCIAL COMPLAINT OF YOUR WORK OR BUSINESS



Dot McClaren
@DotMcClarenDesign

I'm sorry to hear this! Let's chat offline. I know I can turn your frown upside down.

Replying to @FelixEckhaus

HOW TO RESPOND WHEN YOU FEEL MISUNDERSTOOD/ TAKEN OUT OF CONTEXT



Dot McClaren

@DotMcClarenDesign

{State the problem, e.g. On (date), I wrote a blog post/tweet/social media comment about X.} Some {commenters/followers} brought to my attention that it was {racist/sexist/offensive}. Of course, I don't identify with any of those labels. In fact, I work hard to be the opposite.

But I can see how that {blog post/tweet} could be interpreted that way. I can do better. And I will.

{Include ways in which you will modify your behavior based on this feedback.}

I'm sorry.

TEMPLATE 37:

HOW TO RESPOND WHEN YOU SUCCESSFULLY RESOLVE A COMPLAINT



Dot McClaren
@DotMcClarenDesign

I'm glad we sorted out the {miscommunication/problem/misunderstanding}. I always want my clients to feel valued, appreciated and important—because you are! I'm sorry if you questioned that for a second.

As a small business owner, my reputation is everything. It would be really helpful if you could follow up your original {post/tweet/comment} with one that mentions that we happily resolved the issue.

Thank you so much! Here's to a long and happy relationship.

TEMPLATE 38:

HOW TO ADDRESS YOUR WORK BEING USED WITHOUT YOUR PERMISSION

Subject: Copyright infringement

Hello

It's come to my attention that you {or company} are using my work without permission. {Add details, e.g. 'I am referring to the photograph of a little girl playing hopscotch that is on your business's Facebook page. I believe you may have taken it from my website.'}

Please remove the {work} immediately. If this doesn't happen within 48 hours, I will pursue legal action.

Thank you,

{You}

“

After being in business for more than 10 years, I've experienced quite a few instances of designs and photographs being copied or used without our permission. I don't advise calling out the other company publicly on social media. I made that mistake once early on—and it didn't make either party feel good. Reach out to them with a stern, but polite email. I found that in all cases, I got a response. But the advice I like to follow now is to keep creating, keep innovating and always stay one step ahead of your copycats.

”

**JENNA PARK**

Founder of Whimsy & Spice

What to Do When Your Work Has Been Used Without Your Permission

Photographers, graphic designers and illustrators are especially vulnerable to having their work whisked away from their websites without permission. This is as illegal as it is infuriating—and there are things you can do about it.



ADD TERMS AND CONDITIONS TO YOUR WEBSITE

A legal page on your website won't be the most scintillating read, but it will protect your work. Terms and conditions usually cover everything from liability to privacy to copyright and is advisable for all small businesses.

RESOURCES TO CREATE TERMS AND CONDITIONS

- › [Terms and Conditions Generator](#)
- › [Terms and Conditions Template Generator](#)
- › [Free Terms and Conditions Generator](#)

Good news: You do not need to register your copyright. It's enough to simply put in on your web page or design. However, if you register it (for a fee), you'll have a stronger case if you want to bring a lawsuit against someone who infringes your copyright.



COPYRIGHT EXAMPLE:

Copyright © Jabber Designs. All rights reserved.

Conclusion

Keep these templates in your back pocket so you can feel more confident—and less awkward—when tackling tough conversations. Good luck!





HEAR YE!
HEAR YE!



Want more business advice?
Get it delivered to your inbox with the
FreshBooks blog newsletter.

[Subscribe Now](#)