



Client Communication Sheet

Setting Communication Goals

What do you aim to achieve with the email / phone-call / face-to-face conversation?

STATE:

RELATIONSHIP:

TASK:



Scripting and Preparation

Pre-frames:

Introduction:

Questions to ask:

Call-To-Action:



Reflection and Learnings

Did you achieve your outcomes? (state, relationship, task)

If no, where in the conversation do you feel it didn't go well? Was there a specific moment where it turned?

What will you do differently next time?