How to Set Up Client Communication Rules That Survive Scope

Work World · about 11 minutes · 2026-11-09

Turn a one-page kickoff document, written scope, and a fixed weekly rhythm into client rules that keep projects moving when the work changes.

Things you will need

- One-page kickoff document template
- Onboarding questionnaire with 10 to 15 questions
- Written contract with a scope schedule
- Acceptance criteria sheet per deliverable
- Change-order table with prices and added days
- Revision-round definition and per-round rate
- Weekly status email template with five sections
- Meeting agenda template with decision goal
- Call-notes recap format
- Screen-recording tool for async walkthroughs
- Email schedule-send feature turned on
- Invoice template with due date and payment method
- Reminder sequence calendar with three follow-up dates
- One-page wrap-up and handoff template

Write the Kickoff Document Before Work Starts

1. **Send a One-Page Kickoff Summary Within 24 Hours**
   The day a project is signed, send a single page that names the response-time promise, the point of contact on each side, which channel is used for what, your office hours, and the escalation steps if something goes quiet.
2. **Set a Response-Time Promise You Can Actually Keep**
   Commit to replying within one business day on email and within two to four business hours on chat, then hold that number even when you are busy — a two-line holding reply counts as a reply.
3. **Name One Point of Contact on Each Side**
   One client contact in, one of you out.
4. **Give Every Channel One Job and Write It Down**
   Assign each channel a single purpose and publish it: email for decisions, approvals, and anything that needs a record; chat for quick questions with no commitments; calls and video for disagreement, ambiguity, or relationship-building; the project tool for file versions and task status.
5. **Publish Your Office Hours and Escalation Steps**
   State your working hours and time zone on the kickoff page, plus two or three blackout dates per quarter when you are unreachable.

Onboard the Right People and Freeze the Scope

6. **Send an Onboarding Questionnaire Two Days Before Kickoff**
   Ask for ten to fifteen questions answered in writing before the kickoff call: who the real stakeholders

are, launch or deadline dates already committed elsewhere, brand assets and logins, examples the client loves and hates, internal approval steps, and the single outcome that defines success.

7. **Map Every Decision-Maker Before the First Draft**

   From the questionnaire answers, sketch a one-screen decision map: who signs off, who influences that person, who reviews for compliance or brand, and who quietly blocks things late.

8. **Write Acceptance Criteria for Each Deliverable**

   For every deliverable, write two to four criteria a reasonable stranger could test: file format and dimensions, pages or screens included, performance or accessibility targets, and the exact phrase marking what is not included.

9. **Define Revision Rounds and What Counts as One Round**

   State that each deliverable includes two rounds of revisions, and define a round: consolidated feedback from the client within five business days, applied by you in one pass.

10. **Price Change Orders Before the First Ask**

    Attach a change-order table to the contract: the change, the extra cost, and the added days, with a signature line.

Run a Weekly Rhythm the Client Can Predict

11. **Send the Status Update the Same Day Every Week**

    One email, same weekday, same hour, every week of the project — five short sections: done, in progress, blocked, next, needs from you.

12. **Default Every Meeting to 25 Minutes With an Agenda**

    Book 25 minutes, not half an hour — Parkinson's law is real in client calls, and a short clock forces the conversation onto decisions.

13. **Return Notes and Decisions Within 24 Hours**

    Within one business day of any call, send a note with three parts: decisions made, actions with owners and dates, and open questions.

14. **Record Short Async Walkthroughs Instead of Calling a Meeting**

    For design reviews, site builds, or anything on a screen, record a three-to-five-minute walkthrough with your face optional and your screen doing the talking, then send it with a one-line summary and the decision you need.

15. **Answer Late-Night Messages Without Breaking Your Boundaries**

    When a client messages at eleven at night, your job is not to reply at eleven — it is to make them feel safe that morning.

De-escalate Friction, Collect Payment, and Close Cleanly

16. **Use a Three-Sentence Script When a Client Heats Up**

    When a client arrives angry, send three sentences before any defense: name the feeling and the stakes, restate the facts as they see them until they agree you have it right, and offer two concrete options with dates.

17. **Invoice on a Fixed Cadence With Clear Terms**

    Bill on the same dates every project — for example 40 percent to start, 30 percent at a named milestone, 30 percent on delivery — with terms of net 14 or net 30 and the payment method stated on the invoice itself.

18. Pause the Project in Writing When Payment Slips

If a pause becomes necessary, send one email: state the unpaid amount and the invoice date, say work pauses on a specific day unless payment arrives, confirm what is delivered and paid for so far, and offer a short call.

19. Hand Off With a One-Page Wrap-Up Document

On final delivery, send a wrap-up page: what was built, where every file and login lives, what is covered by the 30-day fix window and what counts as new work, and the two or three next steps you would take if you were them.

20. Fire Clients Who Cost More Than They Pay

Firing is a business decision with a checklist: three or more invoices paid late without apology, unilateral scope changes with no sign-off, contact that turns abusive or contemptuous, or a client whose emails cost you more recovery time than their margin covers.

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Written as a checklist from https://www.howcompass.com/how-to/Set-Up-Client-Communication-Rules. Corrections: https://www.howcompass.c