FOR ARCHITECTS

15 emails to keep clients happy

Templates for architects to smooth difficult client situations

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Why **WorkflowMax?**

Ah, clients. We love them, we respect them. Sometimes we want to throttle them. (But that's not exactly a good client relations policy for your firm.)

These days more and more of our client interactions are done by email. And email is an inferior communication tool.

why?

Email is impersonal

Picture this: your client has made some changes to the scope of the project, and you need to make her aware that this isn't covered by your original quote.

- **In a face-to-face meeting with this client, you bring up this issue.** You can tell she's not happy, but you can sit together and hash out the details. A kind tone and a smile can leave both parties feeling satisfied.
- **If you can't get the client into the office, you call to tell her that if she wants you to redesign the entire roof to be twelve inches steeper, the bill will be higher than she was expecting.** By keeping your tone light and making a joke about it being akin to shoe shopping (where you walk in with a specific budget and then get distracted by all the shiny things, and before you know it you have three more pairs of shoes that you never knew you needed). And everything is cool.
- **Or, you send an email.** Without your kind tone, smile, and facial expressions, your email comes across as cold and annoyed, like a mother scolding a disobedient child. Your joke about the shoe shopping seems more like a sarcastic dig at her personal spending habits.

Client relations are now down the toilet.

But what if you don't have time for an email or face-to-face meeting? What if you need to email ten clients the same message in one afternoon? Sometimes it's much easier to blast off an email.

so, what's the answer?

Email templates for amicable client relations

One of the most useful tools for dealing with common client situations – especially difficult ones – is to create a series of standard email templates for the different aspects of a project. This ensures that when something comes up, you can always maintain your professional face, and won't say something you'll later regret.

In this ebook you'll find 15 different templates for difficult client situations. Are you dangerously close to sending that snarky client email? Think again! Use one of these templates instead.

List of templates in this ebook:

Client onboarding & brief issues

1. When you need to decline a project
2. When you need to decline a project because it's completely crazy
3. When the brief is vague and terrifying
4. When the client wants to make changes above and beyond the original brief
5. When you need to follow up about a tender

Contract issues

6. When you need to terminate a contract
7. When a client changes their mind after contract negotiations

"We messed up" issues

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11. When payment is overdue
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Client onboarding & brief issues

1. When you need to decline a project
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TWEET THIS

1 When you need to decline a project

What happens when you're already pulling 70-hour weeks and more work is still coming in? Or that troublesome client you worked with last year and swore you'd never work with again comes back with another project?

Occasionally you'll need to decline a project at your architecture practice, but how do you do this while keeping things friendly and not closing the door on future opportunities?

Dear Not-Potential-Client,

Thanks for your inquiry in regards to your renovation design. This looks like a fantastic project and a great fit for our firm.

Unfortunately, we're absolutely swamped with work right now, and aren't currently taking on any new projects for the foreseeable future. We want to be able to give 100% to all of our clients, and so, we'll have to pass at this time.

We anticipate coming up for air around March, so if you're still looking for an architect then, we'd be happy to talk more about your requirements. Otherwise, we wish you luck in your search, and trust you'll find the right architect for your needs.

Thank you for your support.

Sincerely,
Overworked-And-Underpaid-Senior-Architect

TWEET THIS

2 When you need to decline a project because it's completely crazy

Sometimes, you'll receive requests that are completely bonkers. Many people simply don't read your website before inquiring, or they don't understand the scale required to make an architecturally-designed building cost-effective, or they just live on planet Mars.

How do you decline these requests in a way that doesn't invite further correspondence, but without being rude or condescending? Here's a template to help:

Dear Crazy-Person,

Thank you for your inquiry regarding a bespoke villa design for your dog, Mr Puggles.

Unfortunately, we're not able to take on your project at this time. Your project doesn't quite fit with the type of work we usually do, and we don't accept payment in the form of squeaky bone toys.

Thank you for thinking of Big Awesome Architects, and we wish you the best of luck with your endeavours.

Yours Sincerely,
Bamboozled-Account-Manager

TWEET THIS

3 When the brief is vague and terrifying

The client comes to you with an exciting project and they want to get started right away. The problem is, they seem to be of the opinion that you will fill in the blanks of their vague brief with ESP.

"We'd like our office block to look funky." Define "funky"? "Oh, I'm sure you'll think of something."

Asking for clarifications at the beginning of the project will save countless headaches further down the road.

Dear Vague-Client,

Thank you for contacting us to look after the office refurbishment for Company-X. We're really excited to be working with you on this project.

In order for us to do our job well - and for you to get the results you want within your budget - the first step is to really nail down a brief for the project. We need you to answer the following questions:

question 1, question 2, question 3

OR

We need to sit down with you for a meeting to agree on the brief. We'd be happy to come to your office or meet over Skype if this is more convenient for you.

If you could get back to me before the end of the week, that would be great. If you have any questions, don't hesitate to give me a call or send me an email.

Sincerely,
Needs-More-McBrandalot

TWEET THIS

4 When the client wants to make changes above and beyond the original brief

"We really like this cottage design, except we'd like to add a garage. Oh, and can you add another story, just quick, and change the material from wood construction to brick? Just so we can see what it looks like? It shouldn't take more than 5 minutes. Oh, and add a swimming pool, too."

Scope creep in large projects is practically a given, and many architects will accommodate it in their pricing structure.

If, however, the client is getting too ambitious with what they consider part of the job, you may need to let them know that additional charges will occur for extra work.

Dear Badgering-Client,

Thanks for sending through the new requirements / amendments on the project – we're definitely happy to provide a bespoke stable building in addition to the main house work.

Just to let you know, this additional work is not covered by the brief, and will add a final $4275 to your bill. The revised quote is attached, taking into account new timeframes and fees for the project.

Let me know if you're happy with this, and then we can proceed.

Thanks,
One-Overworked-Architect

TWEET THIS

5 When you need to follow up about a tender

A prospect has contacted you and invited you to tender for an exciting project. With input from the rest of your team, you put together a professional pitch and forward it well before the deadline. You're feeling confident that you'll hear from that prospect soon.

The deadline passes. And then another week. And then ANOTHER week. You still haven't heard about the tender. In fact, come to think of it, you never had acknowledgement from the client that they actually received your package. Hmmm.

What do you do? Here's an email template for following up on a tender after the due date.

Dear Dream-Client-Who-Doesn't-Recognise-Our-Genius,

Thank you again for the opportunity to tender for the branding project for COMPANY X's property development.

I was writing to inquire about the status of our tender. We sent our documents to this email address on the 15th of last month. It's more than three weeks since the due date and we haven't heard from you. We were wondering if you'd had a chance to review the documents and make a decision?

Please don't hesitate to give me a call with any questions or clarifications on our tender.

Yours Sincerely,
Mr Anxiously-Awaiting-For-This-Awesome-Project-Architect

Contract issues

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When you need to terminate a contract

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When a client changes their mind after contract negotiations

TWEET THIS

6 When you need to terminate a contract

Most architects will, at some point in their history, need to terminate a contract. It's a sad state of affairs and not one any business owner wants to find themselves in. But sometimes, ceasing work with a client is the only option.

A contract termination can come about because of any number of scenarios: The ethics of the client or the project are called into question, the client has become impossible to work with, the client has violent outbursts in your office, the client is lovely but clearly stark-raving-mad.

How you word your letter and under what circumstances you can send it depend on your contract's termination clause (you do have one, right?) but here is a good general letter:

Dear Impossible-Client,

We'd like to thank you for choosing The Best Architects for your project. Unfortunately, we feel at this time that we aren't the right firm for your needs, and will be terminating our contract, effective immediately, as per clause 11b in our agreement.

Please note that this is not a reflection on you personally. We simply feel that another architecture firm would be better suited to meet the requirements of your brief.

Yours Sincerely,
One-Aggravated-(or-Terrified)-Manager

TWEET THIS

7 When a client changes their mind after contract negotiations

Urgh. This is one of the more annoying situations. You've already spent time negotiating the contract, writing out and agreeing on the brief, and you're just waiting for the client to hit "GO".

Now, they want MORE changes. What do you say?

Dear Changey-McChangenstein,

Thanks for sending through the new requirements / amendments on the project – we're definitely happy to amend the current contract to reflect these changes. I've outlined the changes you've proposed below:

LIST CHANGES

Just to let you know, these new amendments actually require us to draw up a new contract, which will take us a few days to finalise. The price will also change. Since this is the third contract we've drawn up for this project, we ask that you please make sure you're satisfied with the new scope and requirements for this project before I create another contract. We would hate for your build to run behind schedule because it was caught up in the contract stage!

Let me know if you're happy with these new requirements, and if you're happy for me to proceed with the contract.

Thanks,
One-Overworked-Architectural-Drafter

“We messed up” issues

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When you won’t be able to deliver the project on time

9

When you need extra hours to complete the project

10

When the cost of the final project is significantly higher than your initial estimate

TWEET THIS

8 When you won't be able to deliver the project on time

It's the architect's worst nightmare: The deadline is looming, the client is waiting, and – for reasons beyond your control - you know you won't have the drawings finished on time.

It could be that a rare tropical disease has laid out most of your team, or a family emergency has temporarily shut down your preferred printer, or you've just taken on too much work this month and something has to give. It could simply be that you underestimated the number of hours a project would take. Hey, it happens.

If you've been an architect for long enough, a missed deadline is bound to happen. If an email will be the right format to catch your client, then here's an idea of what you could say.

Dear Our-Favourite-Client-In-The-Entire-World-Whom-We'd-Be-Very-Sad-to-Lose,

As you know, the final due date for your drawings is approaching. I'm writing to give you an update on the status of the project.

We've finished the design and structural work on seven of the ten homes in the development.

Unfortunately, we're not going to be able to meet the deadline for this project. We take full responsibility for this issue: (INSERT REASONS HERE).

This is by no means a normal occurrence. We're working as hard as we can to fix the problem and get your drawings ready for submission by the due date.

To get the project back on track, we have ... (USE THIS PARAGRAPH TO STATE WHAT YOU'RE DOING TO RESOLVE THE ISSUE).

If you have any questions or concerns, please don't hesitate to get in contact with me at your convenience. Once again, I apologise sincerely for the delay.

Yours Sincerely,
Profoundly-Apologetic-Account-Manager

TWEET THIS

9 When you need extra hours to complete the project

Sometimes, for all your planning and forecasting and job management skills, a job will just take longer than you thought.

This might be due to problems or changes requested by the client, or maybe a stakeholder is being difficult, requiring additional management time, or it might simply be that you've underestimated the amount of work required for any one stage.

But for whatever reason, your contract states that the client is going to need to pony up for this extra time, and this template should help to soften the blow:

Dear Perfectly-Wonderful-Client,

I'm just writing to give you an update about progress on your plans.

Things are progressing nicely, and we've finished all the design detail on your home - we're just waiting on structural details from the engineer before we put everything together.

However, compiling all the details for your building is taking longer than we anticipated, and this means that my initial estimate of 20 hours drawing time is incorrect. We're hoping to complete the plans in around 28 hours.

I apologise for this miscalculation in my quote - my responsibility is to keep you informed throughout the design process so you don't get a surprise on our invoice. If you'd like to discuss the new hours, please don't hesitate to contact me on my extension or via email.

Yours Sincerely,
Short-On-Time-Long-On-Patience-Architect

TWEET THIS

10 When the cost of the final project is significantly higher than your initial estimate

You know the drill: You've given the client a rough estimate, and they've said that sounds great, and come in to your office for an initial meeting to further define the scope of the project. It's at that meeting you discover the project is significantly larger than the client let on.

How do you let the client know the project is going to cost more than you estimated?

Dear Demanding-Client,

Thank you for the meeting on Wednesday. With the information you provided we've been able to create a detailed brief of your job and how best we can tackle this complex brief.

The plan is attached for your consideration, along with a quote for the final fee.

I'm aware the quoted amount ($42,780) is above our original estimate. At the time of the estimate, we didn't have all the details for your project. This quote is of full project fee and the final price – you won't get a nasty surprise when the bill comes!

We appreciate your feedback on the brief, and if there are any amendments to be made, please let us know. We look forward to working with you!

Yours Sincerely,
One-Frazzled-Account-Manager

Payment issues

11 When payment is overdue

12 When payment is really, REALLY overdue

13 When you need to stop work because of late payment

TWEET THIS

11 When payment is overdue

Most architectural firms hope they don't have to send these emails often. It's never nice to have to chase up your fee, but unfortunately, it's often necessary as emails are deleted, clients get distracted, and accounts departments go on holiday.

Here's a simple reminder template to ensure your payment arrives when it should:

Dear Non-Paying-Cheapskate-Client,

I hope you're having a lovely week!

I'm just letting you know that I haven't received payment of $6280.50 for invoice 00846 in my account yet. As stated on the invoice, payment is due seven days after receipt of invoice, or a late fee will apply. I know it's easy to forget these things, so let me know when the money has been sent though.

Yours Sincerely,
Starving-Account-Manager

TWEET THIS

12 When payment is really, REALLY overdue

Sometimes, you get a true non-paying client - the kind who will try to get out of paying the bill by any means necessary. For them, a different approach is needed.

Dear Lowlife-Scumbag-Non-Paying-Client,

On 4th October we sent you an invoice for services rendered. The invoice number was INV-02733 and the total amount was $8922.00.

We've still not received payment for this project, nor a response to my previous email. According to our payment terms, a late payment penalty now applies, making the new total $9134.00.

Please send payment immediately, or contact us if you are having difficulties and we will happily work on a solution together. We'll contact you to follow up if we haven't received payment by 9th December.

Yours Sincerely,
One-Broke-And-Living-In-The-Gutter-Architect

TWEET THIS

13 When you need to stop work because of late payment

Most architects divide their fee into smaller payments, usually with an upfront deposit. You will send out incremental invoices, your client pays the invoice, and you continue working to deadline – it's a great system.

That is, until a client decides not to pay their invoice. Without that money coming in, you shouldn't be expected to continue work on a project.

Here's a template email that will hopefully jolt them into action!

Dear Scummy-McNopay-Client,

Unfortunately, this email is to inform you that we need to cease work on your project due to delinquent payment. We sent you an invoice for the current work completed on [date], which was more than 35 days ago, and have not yet received payment. As per the terms of our contract, we will not be able to continue work until this invoice is paid.

It's possible our invoice simply fell through the cracks. I've attached another copy for your convenience, and will contact you again on [date] if payment has still not been made. If we don't receive payment by [date], we'll need to take legal action.

Hopefully we can get this sorted out so we can get back to work asap. Please don't hesitate to contact me if you have any questions or concerns.

Yours Sincerely,
Keeping-the-Lights-Turned-On-Architect

Things you're too chicken to say face-to-face

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When you decide to raise your rates

15

When you want to ask for a testimonial

TWEET THIS

14 When you decide to raise your rates

There comes a time when every practice owner opens the books and realises it is time the whole firm had a pay rise. As your team upskill and your firm gains experience and reputation within the industry, you're able to command a higher rate. But telling a long-term client that your rates are rising can be daunting, so here's a little template to help:

Dear Cheapskate-Client,

I'm excited to update you on some changes going ahead at Awesome Architects. Over the past five years we've been working with some top clients to produce award-winning campaigns that get their brands noticed. We've watched companies like yours flourish – [add some specific results from your recent campaigns].

We want to continue to grow and offer the service and results you've come to expect of us. In order to remain competitive while still retaining our quality, we're raising rates across our company, effective starting next month. I've attached a new rate sheet so you can see how the changes will affect your projects going forward. The new rate reflects our increased experience, quality service and reputation within the industry.

Rates increases are an unavoidable part of doing business, and we hope we can continue to serve your company long into the future. If you have any questions or need clarification, please don't hesitate to contact me to discuss your project.

Yours Sincerely,
Relaxing-on-a-beach-on-my-own-private-island-Director

TWEET THIS

15 When you want to ask for a testimonial

Asking for testimonials makes my palms sweat every time I have to do it. Testimonials are the little blurbs your clients give you – where they exclaim over how wonderful you are, how you've changed their life and made them rich beyond belief, and why others must hire you or face dire consequences.

You want awesome testimonials from your most loyal clients, but asking for those testimonials can be worse than having teeth pulled.

Here's a template you can use to send to your top clients. If it doesn't generate at least one new testimonial, well, the problem isn't with your email.

Dear Awesome-(and-Did-We-Mention-Amazingly-Talented-and-Rakishly-Handsome?)-Client-Who-We-Love-Very-Much,

Thank you for working with us recently on your office refurbishment. We really enjoyed the creative challenges in this particular project!

We're currently in the process of updating our website, and we're wanting to showcase some client projects in our gallery page. We wondered if you would be happy for this project to be featured on our site and, if so, could you provide us with a few words to accompany it?

You could either provide a short testimonial paragraph describing the experience of working with us, and what results we achieved, or you could simply write a few sentences answering the questions below:

- What was the best thing about working with us?
- What results has our work generated for your company?
- What was your clients' / the public reaction to the building?
- What can we improve on?

Please let us know if you have any questions. Thank you so much for choosing us and we hope to work with you again in the future!

Yours Sincerely,
Your-Humble-Account-Manager-Servant

These are some typical client situations where having email templates is a great idea. The templates enable you to send professional correspondence in difficult situations, when you might otherwise want to curse your client to a fiery death.

Just remember

Be polite and listen. If a client is raising a concern, what they are looking for is acknowledgement that you've heard the issue and that you're working to resolve it. Instead of jumping to defend yourself, just listen to the issue and offer to go away and investigate and come back with a solution.

Explain. Often clients do silly things because they don't understand the process. Teach them what you want them to do.

Keep your cool. If a client is being rude, belligerent or downright crazy, don't stoop to their level. Stay calm and save your ranting for after-work drinks.

Have a face-to-face. If you have a particularly delicate or difficult matter to discuss with a client, it might be best to do this in a face-to-face meeting, or over the phone, as tone and meaning in email can often be misinterpreted.

Take action. Offer a solution or two that will resolve the issue. Explain the pros and cons of each option to the client. Be very clear about what they are and aren't getting.

Cut your losses. Sometimes, you will have clients with problems you just can't solve. The only thing you can do in some cases is to send the client on his/her way and vow to learn from your mistakes.

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See how WorkflowMax allows an award-winning architectural firm to **demonstrate their value to clients**

Watch this case study on our website at
www.workflowmax.com/cymon

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End-to-end project management for architects