



# My Failsafe Method to **Manage Tricky Clients**

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**QUICK WIN WORKSHEET**



# BEFORE WE BEGIN...

This method doesn't replace your individual relationship with or understanding of the client, or the particular nuances of the project or your circumstances or your business.

The aim here is to give you a methodical, intentional guide to help you navigate a tricky situation and come out of it relatively unscathed with the outcome you want.

If you're having challenges with a client, before you use this method, it's important to identify the reason for the issues. Because that will determine if this approach is the right one in the first place.

So first you need to decide if this is a tricky but solvable situation or if it's something else...

## TRICKY BUT SOLVABLE...

There's been a miscommunication or similar, things have veered off track, emotions are a bit frayed but the project/relationship is still saveable!

## SOMETHING ELSE...

- 1. The client is being abusive, unkind or conflicting with values that are important to you.
- 2. You made an error.

If you made an error, then really you should do what you can to fix it and save the project, the relationship and your reputation. If the client is being abusive, it's time to say goodbye.

If, on the other hand, it's tricky but solvable, read on...

# 1. EMOTIONAL VS RATIONAL

	What emotions are at play here?	What might be causing them?	How could you help resolve them?
YOUR CLIENT			
YOU			

What are the facts? What is the actual situation when you take all of the emotion out of it and how can you work to resolve that?

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## 2. STAY POSITIVE

It doesn't help the situation to get angry or frustrated with the client. It will put you in a more negative mindset, prevent you from separating emotions and facts, and therefore get in the way of getting a healthy resolution.

Use this space to do a braindump and then move on.

What is frustrating you...

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How could you reframe or see it from the client's perspective...

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## 3. YOUR DESIRED OUTCOME

What is the outcome you want from this? Try not to focus on what should happen, or what someone else wants, think about what you want, and what's best for you and your business.

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Then write down how you will feel and what things will look like for you if you don't achieve that outcome vs if you do. The purpose here is to focus on the positive results you will get from working to achieve your desired outcome.

**ACHIEVED**

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**NOT ACHIEVED**

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## 4. THE OBJECTIVES & GOALS

What were the original objectives and goals of the project?

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What were the outcomes the client wanted to achieve? What did they brief or ask you for?

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Are you still on track to meet those outcomes? Describe how? And if not, what steps would need to be taken to get back on track?

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What were the strategic parameters set for the project? Are they being adhered to and why?

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## 5. PLAN FOR AN INTENTIONAL DISCUSSION

How will you acknowledge, support and respectfully move forward from the clients emotional state?

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What questions can you ask to allow your client to share their perspective in a calm way? How could you respond in a balanced and respectful way and protect your energy?

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Think about your desired outcome? How can you use the current rational situation, the project objectives, and strategic parameters to guide the discussion towards that outcome?

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What would you be willing to compromise on? What is your position if you can't agree on your desired outcome or an acceptable compromise?

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But whilst they invest time honing their creative skills, who's teaching them how to run a successful creative business...? To manage the money, the clients and the projects to make a healthy profit, stay sane and hold on to their creative mojo.

For almost 2 decades, I worked in global agencies as a design, strategy and business lead. I helped those agencies grow and expand, whilst sticking to their guns, cultivating happy people and producing great work.

And for the last 7 years I've built (and stayed in love with) my own successful, multi-six figure creative consultancy... on my terms.

And now, amazing creative person, I want to help you do the same.

*Bec*



## STAY IN TOUCH

E: [becky@bechughes.com](mailto:becky@bechughes.com) \ W: [bechughes.com](https://www.bechughes.com) \ Facebook + Instagram @bechughesbranding