

Cheat Sheet: Having Great Conversations with Clients

1. Active Listening

- ✓ Maintain eye contact and nod occasionally to show attentiveness.
- ✓ Don't interrupt—let the client finish before responding.
- ✓ Summarize key points to confirm understanding (e.g., "So what I'm hearing is...")

2. Asking the Right Questions

- 💡 **Clarify Needs:** "Can you elaborate on what's most important for you in this project?"
- 💡 **Prioritize Features:** "If we had to phase out certain features, which ones would be essential at launch?"
- 💡 **Understand Constraints:** "What are your budget and timeline expectations?"
- 💡 **Know the Audience:** "Who will be using this product the most, and what are their key needs?"

3. Managing Expectations

- 🚦 **Be Transparent:** If something isn't feasible, explain why in simple terms.
- 🚦 **Offer Alternatives:** "Instead of a full mobile app now, how about a mobile-friendly site with app development later?"
- 🚦 **Avoid Overpromising:** If you're unsure, say, "Let me assess this and get back to you with a realistic plan."

4. Framing Your Responses Effectively

- 💡 **Use "Yes, and..." Instead of "No"**

- ✗ "No, we can't do that in two weeks."
- ✓ "Yes, and to meet your deadline, we can start with a basic version and expand later."

- 💡 **Rephrase Challenges as Opportunities**

- ✗ "The budget is too low for this."
- ✓ "With this budget, we can focus on core features first and build on them later."

5. Keeping the Conversation Productive

- ♦ **Stay Professional:** Keep emotions in check, even if the client is frustrated.
- ♦ **Speak Their Language:** Avoid jargon; use simple explanations.
- ♦ **Summarize Next Steps:** "Here's what we'll do next..."

6. Handling Difficult Clients

If They're Unrealistic:

- “I understand your vision. To ensure quality, we may need to adjust the scope or timeline.”

If They Keep Changing Requirements:

- “Let’s finalize a scope first, and we can plan additional features in the next phase.”

If They Focus Only on Price:

- “Our priority is delivering value. Here’s how this investment benefits you in the long run.”

7. Closing the Conversation Effectively

✓ **Summarize Agreed Points** (“To confirm, we’ll start with X and later add Y.”)

✓ **Set Expectations** (“I’ll send a timeline by tomorrow.”)

✓ **End on a Positive Note** (“I’m excited to work on this—looking forward to great results!”)