



thinkfixed.com



thinkfixed.com

An "Expert's" Guide to Working with Clients

Geof Bowie

ceo :: founder

Retention Referrals



Verbal Agreement

Verbal Agreement Written Documentation



Verbal Agreement Written Documentation Review

Trusted Advisor



Scope of Work (SOW) Document

Scope of Work (SOW) Document

- ❖ **Name of Decision Makers**
- ❖ **Overview of Goals**
- ❖ **List of Needs**
- ❖ **Caveats**

Simple Explanation of "Why?"

List of Tasks

List of Costs

Relevant Dates

Realistic Timeframe

Referrals!



Culture (Client)



Lock Child in Car

Helpful Phrases



Helpful Phrases

- ❖ **You COULD do that...**
- ❖ **Feel, Felt, Found**
- ❖ **YES, and...[NEVER "NO, BUT..."]**

Moving Forward



thank you





thinkfixed.com

An "Expert's" Guide to Working with Clients

Geof Bowie

ceo :: founder
