

Use this worksheet to develop a script for talking with your existing clients about the changes you're making in your business and how those changes will affect them.

Script for Transitioning Your Clients

I am making some significant changes to my practice and would like to discuss these changes and how they may affect you. This will require confirmation on your end as to how you would like to move forward.

■ Discuss Pivot and Provide Reasoning:

■ I have decided I want to pivot my business because:

■ This pivot will allow me to:

■ These changes will affect you in the following ways:

■ Details of Changes:

■ To justify this, I will be adding/removing/expanding:

■ Options:





■ Option 1

■ Option 2

■ Option 3

It is ultimately your decision, and I will be able to assist you with whatever path you choose. I would love for you to stay, but it has to be right for you. You don't have to decide today as we can follow up with you in one week to see what you would like to do. Do you have any questions for me?



Initial Notice of Rate Increase - Sample

Mr. Robert Johnson
123 Main St.
Anytown, USA

Dear Bob,

I am writing to share some important changes I am making with my business. Over the past few months, I have been focusing on evaluating my business, services, costs, and growth. My desire is to honor my commitment to provide clients with personalized service that supports their goals.

As my business has grown, I've invested in adding services, team members, and resources that help me to better serve you. During this time, I have not adjusted the ongoing costs to my clients, even as the cost of doing business has increased. As we move forward, my goal is to ensure that I provide my clients with the best possible experience, service, and advice.

Beginning on July 1st, I will be adjusting the cost for services from \$50 per hour to \$65 per hour. Based on my market research, this rate is comparable to what is charged by similar firms for similar services.

To ensure that I can continue to make improvements and grow in a way that best serves my clients, I will be evaluating my services and their cost to you every two years to ensure they are in line with the value I deliver.

I feel that the value of the services I provide you easily exceed my fee. If you share this feeling and would like to continue doing business with my firm, please take a moment to sign and return the enclosed form in the envelope provided.

I understand that you may have questions regarding these changes, and I would welcome a call from you to discuss them personally. Please contact my assistant, Jane, to schedule a 15-minute call by calling (202) 555-1234 or emailing janedoe@somecompany.com.

Sincerely,

John Smith
Owner of Some Company



Follow-Up Email (Options) - Sample

Dear Bob,

This is an email follow up to the letter I mailed you recently.

I am writing to share some important changes that I am making in my business. Over the past few months, I have been focusing on evaluating my business, services, costs, and growth. My goal is to ensure that I stay at the forefront of my profession while honoring my commitment to provide clients with personalized service that supports the achievement of their goals.

I have decided to shift the focus of my business and beginning on July 1st, I will be adjusting the cost for services from \$50 per hour to \$65 per hour. Based on my market research, this rate is comparable to what is charged by similar firms for similar services.

In order to explain the changes and discuss your options, I would like to schedule a 15-minute phone call in the next few weeks.

Please call my assistant, Jane, at (202) 555-1234 or click the below link to schedule our call to discuss how these changes may affect you.

[Schedule Your Appointment Calendar Link](#)

I thank you for your business and look forward to speaking with you soon.

Sincerely,

John Smith
Owner of Some Company



Follow-Up Email (Firing) - Sample

Dear Bob,

I am writing to share some important changes that I am making in my business. Over the past few months, I have been focusing on evaluating my business, services, costs, and growth. My desire is to ensure that I honor my commitment to provide clients with personalized service that supports their goals.

After analyzing the profitability of this plan for my firm, in order to continue working with you, I would need to increase your fees to \$80 per hour and I do not feel that is in your best interest.

In order to explain the changes and discuss your options, I would like to schedule a 15-minute phone call in the next few weeks. Please contact my assistant, Jane, by calling (202) 555-1234 or click the link below to use my online scheduling tool.

Schedule Your Appointment Calendar Link

Please schedule our call soon so that we can discuss how these changes may affect you.

I thank you for your past business and look forward to speaking with you soon.

Sincerely,

John Smith
Owner of Some Company



No Response Letter - Sample

Mr. Robert Johnson
123 Main St.
Anytown, USA

Dear Bob,

Over the past few months, we have tried multiple times to reach you regarding the changes that I am making to my business and how they may affect you.

Since we have been unable to schedule a call or meeting with you, I am summarizing the changes and your options for moving forward.

I have decided to shift the focus of my business and this would require me to adjust my hourly rate from \$50 per hour to \$65 per hour, and with that in mind, you have the following options:

- Incur the increased fees, which we would need to discuss over the phone.
- Find another provider that is a better fit for your needs. There are two firms in the area that I can refer you to. If you would like those contacts, please let me know.

Unless I receive other instructions from you by July 1st, I will be sending a contract with the new pricing for your signature.

Please contact me via email at john@somecompany.com, my assistant at jane@somecompany.com, or call at (202) 555-1234 to discuss these changes.

Sincerely,

John Smith
Owner of Some Company



Final Notice Email - Sample

Dear Bob,

The purpose of this email is to let you know that as of September 30th, I will be resigning my services on behalf of ACME Solutions.

I have come to this hard decision after analyzing the profitability of this plan for my firm. In order to continue working with you, I would need to increase your fees to \$80 per hour and I do not feel that is in your best interest. Resigning on September 30th will give you plenty of time to find another firm that can provide you all the services you are requiring and needing.

I have several firms that I would be happy to recommend to you that I'm certain would do a fantastic job. If you would like those names, please let me know.

If you would like to schedule a 15-minute phone call to discuss, please click the link below.

Schedule Your Appointment Calendar Link

In addition, if you have another service provider in mind that you would like to transfer to, my firm would be happy to assist in making this a smooth transition for you.

I'm grateful for the opportunity I had to work with you and wish you well.

Best Regards,

John Smith
Owner of Some Company

